2016/17
MARKETING PLAN
NORTHWEST TERRITORIES TOURISM
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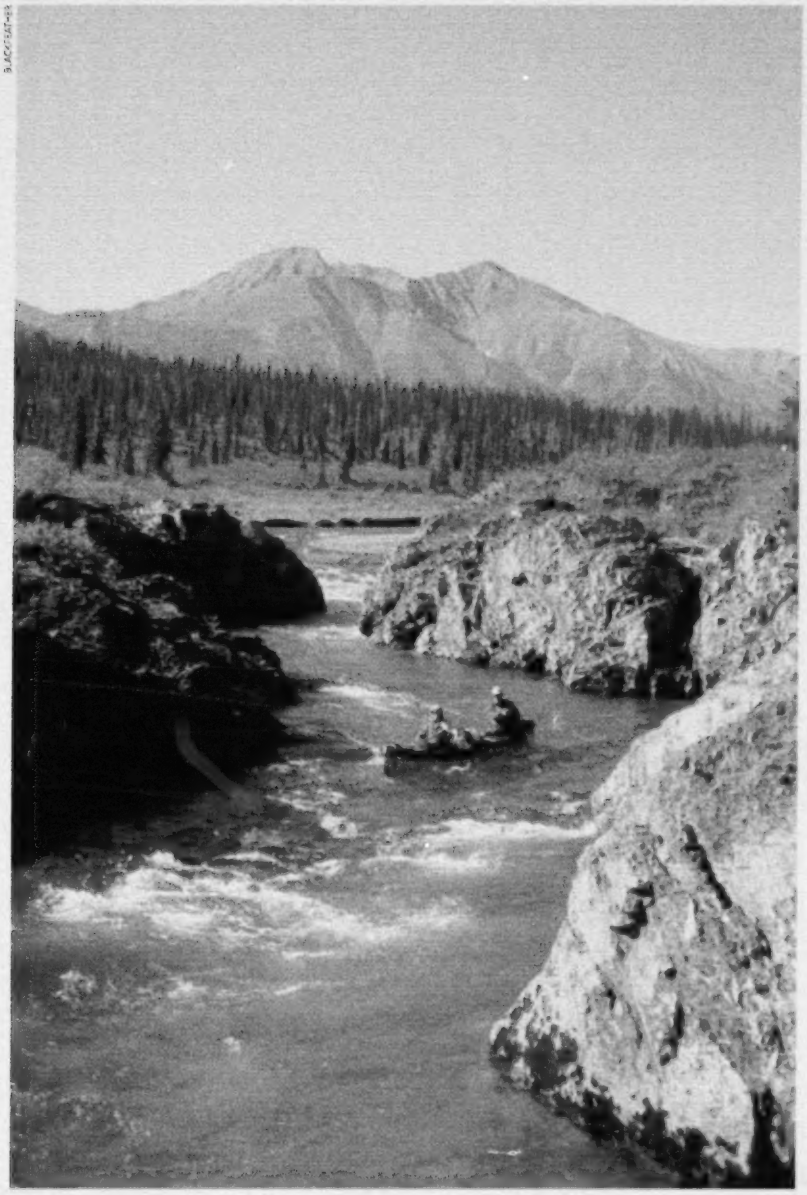
SPECTACULAR
NORTHWEST
TERRITORIES

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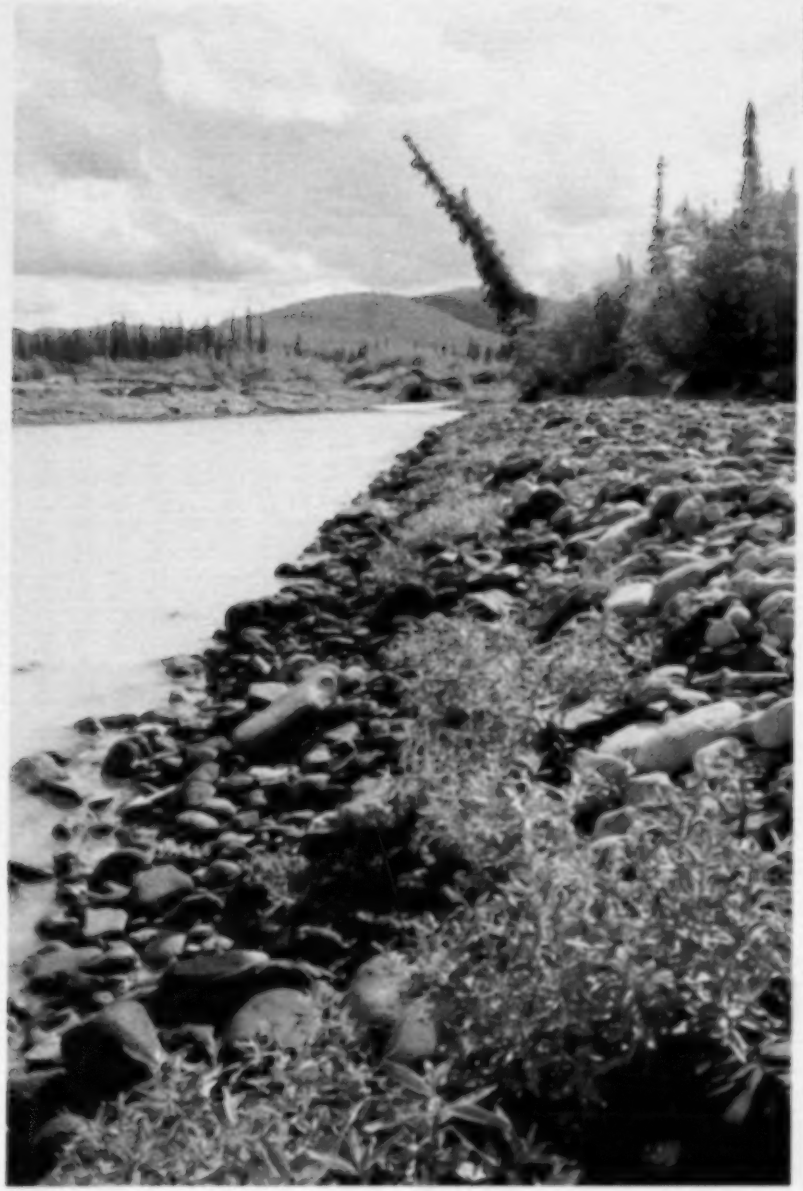


INTRODUCTION

# NORTHWEST TERRITORIES TOURISM

Northwest Territories Tourism (NWT Tourism) is a non-profit organization serving members, businesses and organizations involved in the tourism industry. Through funding contribution agreements from the Government of the Northwest Territories, NWTT undertakes destination marketing activities for the Northwest Territories and works to enhance these efforts through other partnerships and funding agreements. The organization uses a variety of innovative marketing strategies to help build destination awareness and to drive business to local tourism operators. NWT Tourism actively promotes all regions and tourism sectors of the NWT to key domestic and international markets. NWT Tourism works closely with a variety of local, regional, national and international partners to establish its brand, uphold its reputation and to increase visitor revenues to the NWT.

| | |
|---|---|
| **VISION:** | A thriving, vibrant, sustainable and successful tourism industry. |
| **MISSION:** | To grow the tourism industry in the NWT in order to support a strong and sustainable economy. |
| **GOAL:** | To increase the number of visitors and visitor spending in the NWT. |
| **OBJECTIVES:** | To increase destination awareness. To strategically promote all tourism sectors in the NWT. To drive traffic to all regions of the NWT. |

# MARKETING PLAN PROCESS

The 2016/17 NWT Tourism marketing plan outlines the markets and marketing activities NWT Tourism will undertake to achieve the goal of increasing visitor revenues in the NWT. The marketing plan builds on the foundation of previous marketing plans, supports implementation of the GNWT's Economic Opportunities Strategy and includes a number of strategies that will help create efficiencies, build new and strengthen existing partnerships, create fresh, innovative content for our marketing platforms, diversify our product offerings, reinforce our unique selling position and grow tourism revenues in all regions of the NWT.

The 2016/17 marketing tactics will change significantly from those in plans presented in recent years. While the priority markets will remain similar, NWT Tourism will be altering its marketing activities to keep pace with the significant shift in the way consumers use technology to research, select, book and share their travel experiences. NWT Tourism will place a far greater emphasis on digital technology and will focus resources on developing fresh, inspiring content for all regions of the NWT. NWT Tourism will share this content on a regular basis with the intent of capturing the interest of our

## ABOUT CONTENT MARKETING

*Instead of pitching our products, we are delivering valuable and timely information that's relevant to the buyer and interests them in what we have to offer. This way we can lure best-fit visitors to the NWT Tourism website through search engines, social media, digital advertising and other channels. We hook them in. We engage them. We direct them to operators' websites and eventually you sell them a product they want, all because the content resonates with them.*

target markets and influencing them to travel to the NWT. While the main focus for content marketing will be through the consumer direct channel, NWTT will also incorporate this approach in its media, travel trade and MICE channels to leverage all marketing efforts to develop and share unique content to all target markets.

As part of the process for developing the annual marketing plan, the Tourism Marketing Advisory Committee (TMAC) provides independent strategic advice to the Minister of ITI on marketing the NWT. The committee recommends final marketing plans and strategies to the Minister and recommends adjustments to the annual marketing plan when required. On May 12, 2015 NWT Tourism and ITI met with TMAC to report on NWT Tourism marketing activities and results and to share market research data with the committee. During the meeting NWT Tourism advised that they would shift their marketing efforts towards digital/content marketing in the 2016/17 plan.

Market research has played an instrumental role in the development of the 2016/17 Marketing Plan. Market intelligence and research provided by the Government of the Northwest Territories, Department of Industry, Tourism and Investment (ITI), the Canadian Tourism Commission (now Destination Canada), the Agency of Record (AOR) and NWT Tourism's own research conducted in partnership with CNWT and Environics with respect to the sport fishing sector have helped shape the overall direction of this plan.

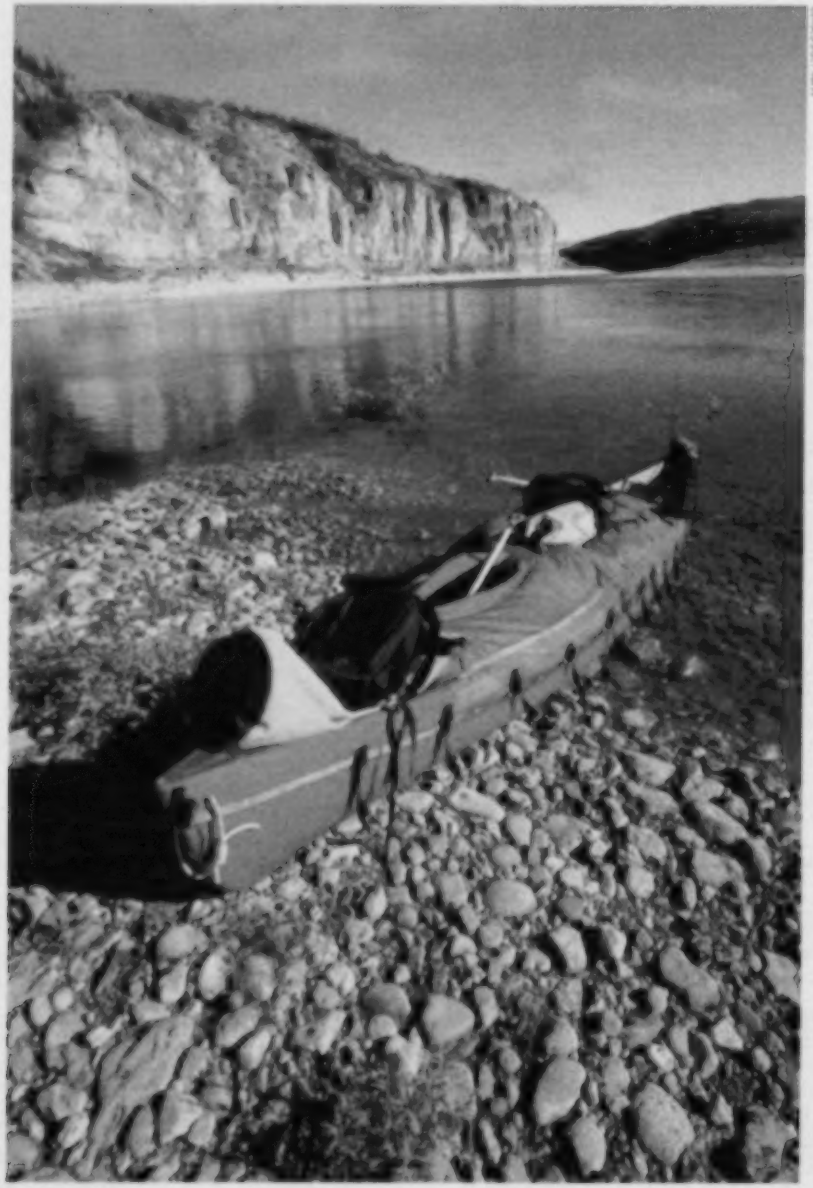
In developing the 2016/17 marketing plan, NWT Tourism dialogued with tour operators, tourism development officers, municipal governments,

Aboriginal governments, and trade and tourism committees throughout the NWT. In the months of February and March of 2015 NWT Tourism held a number of regional workshops that were part of the consultation phase for the development of a five year strategic marketing plan. This plan will be completed by September of 2015. The purpose of these workshops was to solicit feedback on the long term direction of the NWT Tourism marketing strategy as well as to seek input from regional stakeholders and partners on a refresh of the Spectacular NWT brand. These workshops enabled NWT Tourism to gain key insights from various sector groups (hunting, sport fishing, Aurora, outdoor adventure, tourism and business travel). Feedback from these workshops has been taken into consideration when developing the 2016/17 Marketing Plan and NWT Tourism will be revisiting each of the five regions to seek further input on the development of the plan so that we can develop a comprehensive plan that drives visitor traffic to all regions of the NWT and promotes all of the tourism sectors.

Aboriginal Tourism has also been identified as a sector with potential for growth and its potential for success is based on the uniqueness and vibrancy of Aboriginal culture in NWT communities. Recommendations made by the Aboriginal Tourism Champions Advisory Council, an advisory body reporting to the Minister of Industry, Tourism and Investment regarding the development and growth of Aboriginal tourism, have been reviewed and taken into consideration in the development of this plan.

The 2016/17 plan prioritizes NWT tourism markets and focuses on marketing activities that have the most potential for success. The plan takes into consideration both short term and longer term goals as well as other funding sources that may be available to NWT Tourism in the future. During the 2014/15 and 2015/16 fiscal years, NWT Tourism received a total of $1.4 million dollars from CanNor to enhance its marketing efforts in current markets and to expand its marketing reach into new markets. As a result NWT Tourism was able to develop a sport fishing website, expand on the NWT Conference Bureau website, develop a number of foreign language websites (German, Japanese, Chinese, Korean and French), expand sport fishing and Meeting and Incentive Travel (MCIT) promotions and participate in a number of advertising activities in Australia, Korea, France and the United Kingdom. Recognizing the importance of building on this momentum, and to build trust with these new markets, NWT Tourism has made slight reductions to the budgets of our key markets in order to keep a minimal investment in secondary markets until such time that we can secure additional CanNor funding.

When setting goals and objectives for the plan, NWT Tourism was mindful of the many challenges the industry faces such as economic recessions, volatile currency rates, passport/visa issues and natural disasters including the recent forest fire situation in the NWT, and others. Existing infrastructure and the potential for new products and packages were also taken into consideration. As NWT Tourism prepares to move towards a digital/content based marketing strategy an assessment of our current marketing collateral (photography, video, websites, etc.) was conducted and gaps have been identified. The intent is to add to the resources required to support the content marketing strategy.



2016/17 MARKETING PLAN

# KEY STRATEGIES & STRATEGIC OBJECTIVES

As NWT Tourism sets out to grow tourism visitation and revenues within the territory, it will focus on the following strategies and strategic objectives. While much of this is similar to the 2015/16 marketing plan, the strategies are being adjusted to accommodate the move from traditional to content marketing (see page 38).

## KEY STRATEGIES

1. Capitalize on current technology trends to target and effectively communicate with key markets
2. Partner on a united front to package the Northwest Territories
3. Focus on the markets with the highest potential with an outlook on long term sustainability
4. Lead with the best, raise the bar for the rest

NWT Tourism will use the following strategic objectives that will enable it to carry out key strategies.

## STRATEGIC OBJECTIVES

1. Strengthen the Spectacular Brand and build destination awareness with strategic brand management
2. Increase tourism revenues
3. Drive visitation to all regions of the NWT
4. Elevate the presence of Spectacular NWT in an on-line world with sensitivity to mobile phone and tablet technology
5. Actively promote all tourism sectors within the NWT
6. Develop Strategic Partnerships
7. Engage the local tourism industry
8. Endorse and showcase excellence
9. Identify opportunities for the future
10. Manage success through key performance measures

## 1. STRENGTHEN THE SPECTACULAR BRAND WITH STRATEGIC BRAND MANAGEMENT

A compelling brand is paramount to the success of any tourism destination. The brand voice, tone, imagery and messaging influence people's perceptions and a brand should be underpinned with a particular emotional appeal, reputation and attributes that inspire millions of people to visit a particular destination.

In 2007, Northwest Territories Tourism launched the current brand - SPECTACULAR NWT. The brand was developed using intensive, independent customer research. The Spectacular brand provides a clear, compelling way for potential visitors to think about the Northwest Territories. The brand is a motivating "first idea", conveying the vibrancy and natural wonder of the Northwest Territories. The brand was established to help increase destination awareness and drive visitation to the NWT.

Over the past eight years, the Spectacular NWT brand has built significant momentum, particularly in the domestic market. However, over time the brand has become diluted. With the introduction on the "Aurora Capital of the World" sub-brand, and the increase in regional marketing initiatives that have strayed from the brand, the brand has lost some of its key consistencies. Recognizing this, NWT Tourism is committed to refreshing and strategically managing the Spectacular brand. This exercise will help NWT Tourism to regain a clear brand identity and create more ways to promote the brand in all key markets. A brand refresh along with new guidelines for use will enable the unique regions in the NWT to showcase their differences while still operating within the Spectacular brand.

As part of an application to CanNor in 2015/16 NWT Tourism received funding to strengthen the Spectacular brand. This included conducting a number of regional workshops to determine the process for refreshing the spectacular brand, developing regional applications of the brand and setting guidelines for the standards that should be in place to ensure proper use of the brand. Brand research was also conducted to assess the brand identities of other tourism destinations and particularly how their brand attributes were applied across different regions operating under their main destination brand umbrella. A Brand Identity Standards Manual is being produced as an outcome of this process so that everyone using the Spectacular brand will have the correct guidelines in place to maintain brand consistency. The Brand Identity Standards Manual will be completed in September 2015.

## 2. INCREASE TOURISM REVENUES

To increase tourism revenues NWT Tourism will focus on the markets with the highest potential for both immediate and long term potential. Important components of this process are to build destination awareness and create a sense of urgency to travel to the NWT.

NWT Tourism will also focus on establishing a balance between general awareness advertising and targeted niche marketing. General awareness campaigns have proven to be an effective way to generate enquiries and bookings to the NWT. Niche campaigns are also important as they target specific markets or sector groups. As indicated throughout this plan, content marketing will be an integral part of NWT Tourism's marketing activities as it looks to engage in conversations with target markets in a way that will inspire them to travel to the NWT.

## 3. DRIVE VISITATION TO ALL REGIONS OF THE NWT

NWT Tourism is committed to marketing all regions of the NWT. Whenever appropriate all regions of the NWT are featured in integrated advertising campaigns. NWT Tourism recognizes that visitation to many of the regions is down and will be making a concerted effort to help drive more traffic to all of the regions of the NWT.

Promote all access routes into the NWT - This will include air access between Edmonton and Fort Smith, Whitehorse and Inuvik in addition to air access between Edmonton/Calgary/Ottawa and Yellowknife. NWT Tourism also recognizes the significant draw of the Dempster Highway and the Deh Cho Travel Connection for visitors who elect to drive to the NWT.

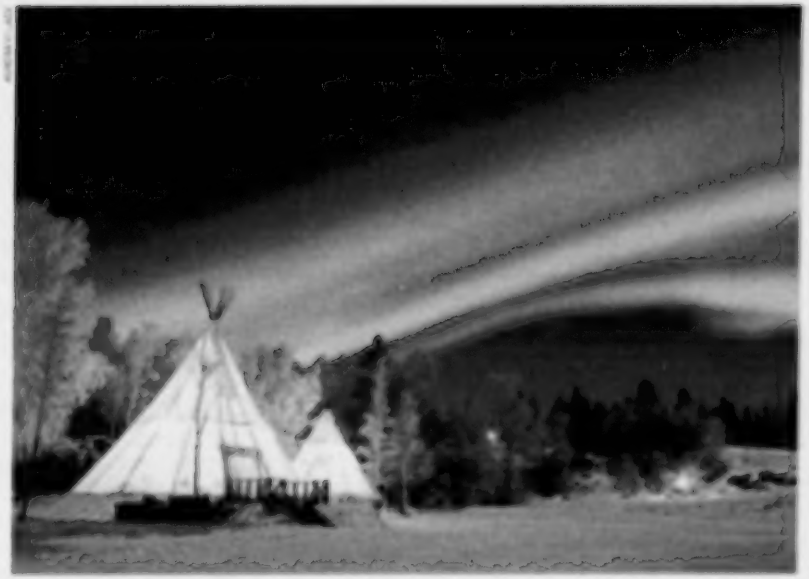
Work with regional partners to identify inspirational content that can be promoted through digital and social media channels - This will include regularly scheduled calls between NWT Tourism and its regional partners to facilitate the exchange of information on new tourism operators, new products and services, identifying photo and video assets and gaps as well as other activities and that will be of interest to target markets. The goal of these efforts is to drive potential visitors to the spectacularnwt.com website and to keep them engaged and returning to the site. Based on this exchange of information NWT Tourism will develop regional content that can be promoted through its digital and social media channels.

Develop regional itineraries – Working in partnership with the Regional Tourism Officers (RTOs) NWT Tourism will develop a series of region-specific sample itineraries. These itineraries will include key points of

information and activities that can be promoted to FIT (fully independent travellers) as self-guided tours, and whenever possible be included as part of consumer and trade packages. NWT Tourism will also produce branded collateral (web and print) for each regional itinerary that can be housed on the NWT Tourism website and made available at the regional visitor information centres. To make these itineraries more enticing, photo and video content will be included in the on-line versions of the itineraries that are created whenever possible.

Develop regional packages – Even for Canadian travellers travel to the NWT can be difficult to arrange. By developing regional packages that can be promoted through consumer channels (and trade and MCIT whenever appropriate) travel to the NWT will become significantly easier and consumer options more obvious. Investing in packaging requires NWT Tourism to provide feedback to stakeholders regarding the return on investment. NWT Tourism will work with partners in these packages to ensure reporting regarding the number of packages sold is carried out so that conversion can be measured. NWT Tourism will work in partnership with GNWT ITI Regional Tourism Officers and a private contractor(s) to develop, market and sell regional packages. NWT Tourism is proposing that a goal be set of two new packages per region in this fiscal year.

Utilize festivals and events as a draw to the regions – NWT Tourism recognizes that local festivals and events are key draws for many tourists. Each region of the NWT has a number of well-established festivals that have the potential to attract visitation from local, domestic and international markets. To help promote festivals and drive traffic from outside the local



communities, NWT Tourism will support and extend the local marketing efforts for a number of key festivals and events. This will be done primarily though a content marketing strategy as NWT Tourism will be looking to expand photography and video assets associated with these festivals so that it can promote the regional festivals in various advertising channels. By partnering with the festivals to support their promotion, NWT Tourism aims to promote festivals packages which also include the promotion of other tourist activities. This will encourage visitors to stay longer in the region when the festival is over and/or will give visitors other reasons to visit. NWT Tourism will establish guidelines for the program which will also include reporting requirements so that it can determine how many visitors attended the festival and how many packages were sold.

## 4. ELEVATE THE PRESENCE OF SPECTACULAR NWT IN AN ON-LINE WORLD

As technology changes it is important to keep pace in order to remain relevant. In the past once a website was built all that was required was to update basic information and photos periodically, embed key content words within the site and ensure the website was linked to many partner sites. This would ensure the DMO website would remain high in Google search rankings. This is no longer the case. Google is now ranking websites based on the frequency of new content that is being posted on the site as well as the digital and social media channels that are engaging with this content. In order to elevate the NWT presence on Google search rankings NWT Tourism needs to constantly be developing new, inspiring content that is engages

target markets. NWT Tourism will work closely with local tourism operators and regional partners to ensure engaging content is developed and shared with the consumer through digital and social media channels.

## 5. ACTIVELY PROMOTE ALL TOURISM SECTORS THAT OPERATE WITHIN THE NWT

While general awareness advertising is a key component to marketing the NWT, NWT Tourism also recognizes that each sector (hunting, sport fishing, Aurora, outdoor adventure and touring) appeal to specific markets, with each sector having different marketing avenues to reach their separate audiences. NWT Tourism will utilize market analytics to define the target markets and to develop appropriate messaging to communicate to these target groups through digital and social media channels. In some cases print advertising will still be used but the majority of marketing efforts will focus on digital promotions.

In the 2013/14 marketing plan NWT Tourism made a long term commitment to promote the sport fishing sector. Recognizing the sport fishing sector has been experiencing a steady decline for a number of years NWT Tourism and ITI undertook a series of research activities specific to the sport fishing sector. Research activities included qualitative research, sector consultation, analytics of key target markets (based on fishing license sales) focus groups and a market survey in Canada and the United States. The research was finalized in January of 2013 and was presented to the sport fishing sector at a regional workshop that was held in Yellowknife on March 28, 2013.

NWT Tourism utilized this research to develop sport fishing campaigns that were targeted to Canada and the US. Marketing activities included print and web advertising and the development of a sport fishing microsite which will be launched in June of 2013. NWT Tourism recognizes that it will take several years of a concentrated marketing effort to help revitalize sport fishing and we are committed to actively promoting the sport fishing sector. NWT Tourism is confident that by using a content based marketing strategy it will be we able to target specific segments within the sport fishing sector and engage them with inspiring content that will increase visitation to the NWT.

## 6. DEVELOP STRATEGIC PARTNERSHIPS

Strategic partnerships will be a key component to the success of marketing campaigns and ultimately increase visitor revenues. NWT Tourism will be actively working to strengthen existing partnerships and to forge new ones.

Traditional partners will include, but not be limited to, pan territorial initiatives with the Yukon and Nunavut, regional partnerships with local communities and DMOs, as well as National and Territorial Parks. Other traditional partnerships include a partnership between NWT Tourism and Travel Alberta to develop travel itineraries that will be promoted to the Japanese market, and the Frasercway one way RV rentals between Whitehorse and Yellowknife. NWT Tourism will also explore non traditional partnerships with private sector industry as a way to expand its marketing reach. NWT Tourism will also work closely with the CTC and CanNor to leverage additional funding to support marketing initiatives.

Leveraging the establishment of the NWT Conference Bureau in 2015, a pre-conference and post-conference packaging strategy will be used to encourage the business visitor to stay longer and also encourage a visit by friends and family or to incent a longer stay for pleasure with others, taken before or after the conference. Partnerships with local businesses and inbound operators as well as with conference planners will be important for the success of this venture.

## 7. ENGAGE THE TOURISM INDUSTRY

For tourism to function at a high level of efficiency it is imperative that a wide range of interest groups from territorial, regional and community governments and the private sector are actively engaged with NWT Tourism in understanding the marketing plan and how they contribute to the success of the tourism industry in the NWT. Each interest group brings their own unique perspective and skill set to the table, all of which contribute to the success of the industry. By creating opportunities to share ideas and opinions and get involved in NWT Tourism's marketing activities there is a greater likelihood that industry partners will buy into our vision and endorse our efforts.

In recognition of this NWT Tourism will be looking to create more opportunities for stakeholder and partner involvement. This will include scheduling regular regional and sector consultations, expanded marketing programs that feature a wide variety and price range of cooperative advertising opportunities and more information and training updates. Moving towards a content based marketing strategy, NWT Tourism will be

looking to enhance the lines of communication with industry stakeholders as we work together to identify, create and share inspirational content with key target markets. As part of the content marketing approach, NWT Tourism will highlight each of the sectors and regions of the NWT. This will include, fishing, hunting, Aurora, outdoor adventure, and general touring. Through content marketing we will also be able to promote additional products such as arts and crafts and diamond tourism.

NWT Tourism recognizes that building support for product packaging, improved customer service and an understanding of the value of tourism to the territory underpins its success. Key opportunities to showcase the value of tourism and the products in the NWT will be integral to helping NWT residents understand that their service and attitude to visitors influences the industry success. These marketing efforts will be aimed at participation in key events or celebrations where tourism benefits have a natural fit. An example will be a coordinated effort across all regions leading up to National Tourism Week to showcase NWT products and their value to our economy.

## 8. ENDORSE AND SHOWCASE EXCELLENCE

Like many other tourism destinations, the NWT struggles with inconsistent delivery of products and services. While some tourism businesses continually deliver outstanding tourism products, experiences and customers service, others are not meeting these standards. Unfortunately, when a visitor's experience is less than satisfactory they often go away with a negative impression about the NWT in general. Today's social media tools make it much easier to disseminate "negative press". NWT Tourism recognizes

the importance of endorsing excellence and will be working closely with GNWT ITI, regional partners and local tourism operators to instill a sense of pride in performance excellence and in the NWT.

To encourage operators to meet these levels of excellence NWT Tourism will provide prominent positioning in promotional activities to businesses that are recognized for delivering a top notch product/experience. It is the hope that this will encourage other local tourism operators to aspire to deliver a high level of service.

The Pan-Territorial marketing consortium (NWT Tourism, Nunavut Tourism and Yukon Tourism) submitted an application to CanNor to develop an infrastructure for establishing a set of market ready criteria that can be applied in all three territories. The consortium was successful in the application and is in the process of selecting an agency to establish the market ready criteria and to deliver market ready training for each of the three territories. The Pan-Territorial marketing consortium anticipates that the establishment of the market ready criteria and subsequent training will be completed by the end of the 2015/16 fiscal year.

## 9. IDENTIFY OPPORTUNITIES FOR THE FUTURE

While the 2016/17 marketing plan is focused on activities within the current fiscal year, NWT Tourism is also cognizant that a number of key opportunities are anticipated over the next few years. In 2017 Canada will be celebrating its 150th birthday. In recognition of this NWT Tourism will be focusing on a long-term strategy to ensure that it will be able to take advantage of the marketing opportunities associated with this event. NWT Tourism has been in discussions with the CTC around the possibility of a Canada's North partnership in which the three territories can be included in a combined promotion. NWT Tourism and ITI have also met to discuss possibilities on other events that can be promoted as part of Canada's 150th celebrations. Other long-term opportunities that NWT Tourism is aware of is the new all season road to Tuktoyaktuk. There is great potential to promote the awareness of the new highway as well as the last opportunities to drive the ice road along the arctic coast.

As new opportunities arise NWT Tourism will strive to have the flexibility to take advantage of these opportunities.

## 10. MANAGE SUCCESS THROUGH TARGETED PERFORMANCE MEASURES

Over the past few years NWT Tourism has made a concentrated effort to analyze and report on the results of its marketing initiatives. Performance measurement has predominantly consisted of marketing metrics such an enquiries to the call centre, website hits, the distribution of travel guides, Facebook likes, etc. While these metrics have been helpful in determining if advertising campaigns are generating interest in the NWT, they are not as effective in determining if NWT Tourism marketing activities are successful in increasing visitation to the NWT. NWT Tourism has identified

the need to be more strategic in selecting performance measures to report on so that it can use this information to identify trends, which will guide future marketing decisions.

NWT Tourism is committed to working closer with GNWT ITI, regional partners and local tourism operators to establish a set of performance measures and report back to industry partners on a regular basis. Performance measures may include, but are not limited to:

1. Number of visitors to the NWT
2. Visitor spending
3. Visitor satisfaction
4. Visitor Information Centre numbers
5. Performance metrics from NWT Tourism print, digital and social media campaigns
6. Packages sold (consumer direct and travel trade)
7. Visitor attendance at festivals and events
8. Hotel occupancy rates
9. Airline travel statistics

Where current numbers exist, we will target a minor increase in 2016-17. Where we do not have current data, we will work with our stakeholders to establish methodologies for collecting data.

# THE TOURISM INDUSTRY AT A GLANCE

## WORLD VIEW

Demand for international travel continues to grow. Despite occasional setbacks, international tourist arrivals to Canada has shown steady growth. In 1950 international visitors totaled over 25 million, in 1980 this number grew to 287 million, and in 2013 this number reached a record high on 1,087 million arrivals. In 2014 international arrivals increased by an additional 4.4%. This is an increase of over 43 million visitors. International tourism receipts totaled $1,201 billion (USD) in 2014. This is a 3.7% increase from the previous year. Countries with strong economic growth are driving travel. China has consolidated its position as the number one source for outbound tourism with the United States and Germany holding the second and third places respectively.

There are a number of emerging trends in the world tourism industry including increased competition as more countries around the world are aggressively marketing their destinations creating increased competition for market share. There is also a growing trend for high-end experiential travel as more wealthy travellers are looking for, and are willing to pay for unique authentic experiences.

Technology continues to play a key role in the travel industry as tourists are increasingly relying on the web and social media platforms to select and share their travel experiences. Social media has established itself as an integral part of everyday lives for many consumers. Across the globe social networking communities are used to share information and to engage with people, communities and brands. The use of social media has made a noticeable impact on the tourism industry. There has been a significant shift towards social media usage through tablets and mobile devices, all of which stems from the need for people to feel connected with their peers. The number of mobile broadband subscriptions has grown annually by an average of 45%, reaching an estimated total of approximately 2.1 billion worldwide in 2013. Mobile app usage also continues to grow at a fast pace as consumers spend an average of 80% of their time on apps and only 20% of their time on mobile web browsing. 60% of smartphone users have downloaded travel-related apps and 45% of those intend to use these apps to help them with their travel planning.

## TOURISM IN CANADA

Domestic travel continues to be the main market for most Canadian Destination Marketing Organizations with just over 80% of visitor spending coming from the domestic market. Canadian travellers are generally optimistic with 38% believing they will travel more over the next two or three years and 79% believing they will spend the same or more on leisure travel within Canada over the next twelve months. When it comes to domestic tourism, Canada faces its stiffest competition from the US, with 46% of Canadian travellers considering a US destination for a vacation in the next year. This has improved from 67% in 2000 when more Canadians preferred a U.S. destination. With the economy slowly beginning to recover, Canadian travellers appear modestly optimistic about their future travel plans and if the current value of the Canadian dollar versus the U.S. dollar remains low, more Canadians could choose to travel in Canada. In 2013, all major tourism indicators for Canada, including tourism revenue, GDP, arrivals and employment increased.

In 2014 Canada welcomed approximately 15.6 million visitors from its key international markets. This was an increase of 2.8% from the previous year. While Canada's tourism arrivals are gaining momentum, they are still below the global average of 4.7%. The United States remains the largest international market for Canada, followed by the United Kingdom, France and China. (China is technically the third largest market for Canada if the visitor numbers from Hong Kong are included). Visitation from the US rose by 3% as favorable exchange rates contributed to higher arrivals by automobile and air. With improved visa and passport processes that will make it much easier to travel to Canada, it is expected that visitation from China, Mexico and a number of other long haul markets will continue to increase.

## OVERNIGHT ARRIVALS TO CANADA

| | [illegible] | [illegible] | % Change |
|---|---|---|---|
| USA | [illegible] | [illegible] | [illegible] |
| United Kingdom | [illegible] | [illegible] | [illegible] |
| France | [illegible] | [illegible] | [illegible] |
| China | [illegible] | [illegible] | [illegible] |
| Germany | [illegible] | [illegible] | [illegible] |
| Australia | [illegible] | [illegible] | [illegible] |
| Japan | [illegible] | [illegible] | [illegible] |
| Mexico | [illegible] | [illegible] | [illegible] |
| India | [illegible] | [illegible] | [illegible] |
| South Korea | [illegible] | [illegible] | [illegible] |
| Hong Kong | [illegible] | [illegible] | [illegible] |
| Switzerland | [illegible] | [illegible] | [illegible] |
| Netherlands | [illegible] | [illegible] | [illegible] |
| Brazil | [illegible] | [illegible] | [illegible] |
| Taiwan | [illegible] | [illegible] | [illegible] |
| **TOTAL** | **[illegible]** | **[illegible]** | **[illegible]** |

# TOURISM IN THE NWT

Tourism continues to play an important role in the economy of the Northwest Territories.

In 2013/14 the NWT tourism accounted for $[illegible] million in visitor revenues. This is a 26% increase from the previous year. Consistent with most other regions of Canada, domestic tourism makes up about 80% of the NWT market. The Aurora sector showed the biggest increase as over 21,700 visitors came to experience Aurora product. This is an increase of 38% over the previous year. Aurora visitor revenues totaled $21 million which was a 38% increase from the 2012/13 fiscal year. The general touring and business travel sectors also experienced significant growth.

While the number of visitors and visitor spending increased, certain sectors continued to experience declines. The sport fishing sector continues to be the hardest hit with visitor revenues decreasing by $1.1 million from the previous year. Over that past year the outdoor adventure sector also experienced a significant decline.

The following tables, with information provided by the GNWT ITI, provide a summary of visitor and visitor spending statistics for all sectors of the NWT.

## NWT VISITOR STATISTICS

| | 2008/09 | 2009/10 | 2010/11 | 2011/12 | 2012/13 | 2013/14 | % change from 2012/13 to 2013/14 |
|---|---|---|---|---|---|---|---|
| Aurora Viewing | 5,500 | 5,400 | 6,800 | 7,400 | 15,700 | 21,700 | 38% |
| Fishing[1] | 7,300 | 6,400 | 5,000 | 4,700 | 4,000 | 3,500 | -13% |
| General Touring | 14,800 | 14,500 | 12,900 | 13,400 | 15,200 | 14,800 | -3% |
| Hunting[2] | 960 | 760 | 440 | 480 | 500 | 510 | 1% |
| Outdoor Adventure[3] | 2,100 | 1,900 | 1,900 | 2,300 | 3,100 | 1,900 | -39% |
| Visiting Friends/Relatives | 9,300 | 12,900 | 13,400 | 11,800 | 13,800 | 14,100 | 2% |
| Total Leisure Travellers | 39,940 | 41,860 | 40,440 | 40,080 | 52,300 | 56,510 | 8% |
| Business Travel | 33,600 | 26,200 | 24,800 | 24,300 | 24,100 | 35,300 | 47% |
| Total Visitors | 73,540 | 68,060 | 65,240 | 64,380 | 76,400 | 91,810 | 20% |

1 Includes guided and unguided trips
2 The number of hunters is rounded to the nearest ten because the totals are less than 1,000

## NWT VISITOR SPENDING[3] (MILLIONS)

| | 2008/09 | 2009/10 | 2010/11 | 2011/12 | 2012/13 | 2013/14 | % change from 2012/13 to 2013/14 |
|---|---|---|---|---|---|---|---|
| Aurora Viewing | 7.3 | 7.2 | 6.4 | 10.2 | 15.2 | 21.0 | 38% |
| Fishing[4] | 17.0 | 12.6 | 12.0 | 12.9 | 10.6 | 9.5 | -10% |
| General Touring | 8.3 | 8.1 | 9.5 | 10.9 | 12.6 | 12.6 | 0% |
| Hunting | 12.5 | 10.1 | 4.3 | 5.5 | 5.8 | 5.9 | 2% |
| Outdoor Adventure[5] | 6.8 | 6.1 | 5.8 | 5.2 | 6.0 | 4.1 | -32% |
| Visiting Friends and Relatives | 4.0 | 5.4 | 6.6 | 7.2 | 8.4 | 8.9 | 6% |
| Total Leisure Travellers | 55.9 | 49.5 | 44.6 | 51.9 | 58.6 | 62.0 | 6% |
| Business Travel | 74.6 | 58.1 | 49.5 | 48.5 | 48.1 | 70.5 | 47% |
| Total Visitors | 130.5 | 107.6 | 94.1 | 100.4 | 106.7 | 132.5 | 24% |

3 Methodology for calculating visitor spending for all sectors was updated and revised in 2010/11
4 Includes guided and unguided trips

*These tables will be updated with 2014/15 statistics when ITI is able to provide them.
We anticipate we will receive the new numbers at the end of September.

## LEISURE TRAVEL TO THE NWT (BY SECTOR/GEOGRAPHIC LOCATION 2013-14)

| | Aurora | | Fishing | | Outdoor Adventure | | Hunting | | General Touring | | VFR | | Total Leisure Travel visitation | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | # | % | # | % | # | % | # | % | # | % | # | % | # | % |
| **Canada** | 2,330 | 11% | 2,765 | 79% | 1,425 | 75% | 165 | 32% | 14,200 | 96% | 13,100 | 93% | 33,985 | 60% |
| **USA** | 450 | 2% | 630 | 18% | 285 | 15% | 310 | 61% | 450 | 3% | 400 | 3% | 2,525 | 5% |
| **Japan** | 14,520 | 67% | | | | | | | | | | | 14,520 | 26% |
| **China** | 2,410 | 11% | | | | | | | | | | | 2,410 | 4% |
| **Korea** | 1,350 | 6% | | | | | | | | | | | 1,350 | 2% |
| **Europe** | 80 | 0.4% | | | 100 | 5% | | | | | | | 180 | 0.3% |
| **Other** | 560 | 3% | 105 | 3% | 90 | 5% | 35 | 7% | 150 | 1% | 600 | 4% | 1,540 | 3% |
| **Total Visitation** | **21,700** | | **3,500** | | **1,900** | | **510** | | **14,800** | | **14,100** | | **56,510** | |

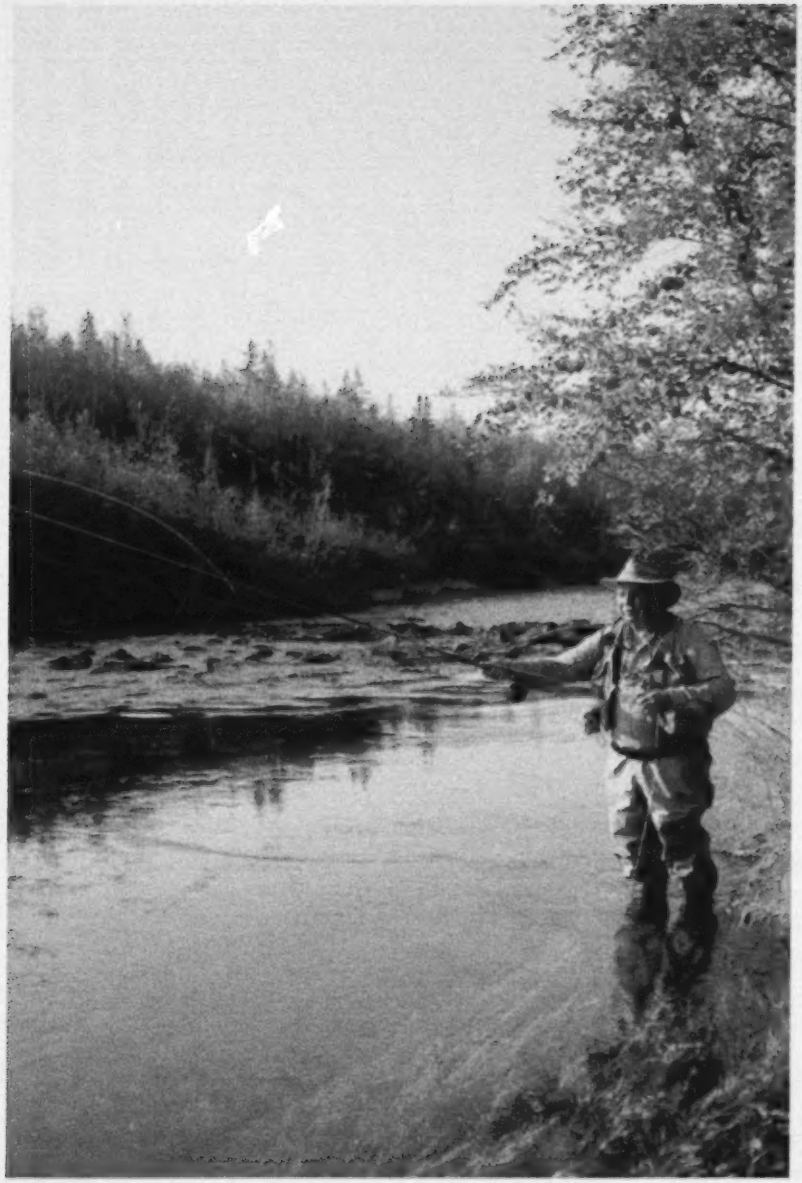
The NWT wildfire issues during the summer of 2014 had an impact on visitation with the North Slave and South Slave being the hardest hit regions. The GNWT reported over 350 wildfires throughout all of the NWT in 2014, and 245 in 2015. The scale of the wildfires regularly impeded road access into and out of the NWT in 2014 as well as travel between regions. In 2014 many wilderness lodges were impacted by encroaching wildfires. Tragically some lodges were destroyed by fire and others had the spectacular landscapes surrounding their operations seriously damaged.

NWT Tourism is unable to estimate the impact that these two summer seasons will have on visitation numbers for the 2016/17 fiscal year. NWT Tourism is also aware that media coverage of the wildfire situation had the potential to negatively impact future NWT visitation in the short term. While it is difficult to measure the impact that the wildfires or their related media coverage will have on future visitor travel decisions, we will continue to focus on the pristine wilderness and other key iconic attractions existing in the NWT.

As part of our overall strategy to drive visitation to all regions of the NWT, NWT Tourism will be working closely with ITI to measure visitor statistics for each of the five regions. The data gathered will help to assess the effectiveness of marketing efforts. One of the important sources of data will be the main visitor information centres (VIC) in the NWT, which are tasked with recording visitor information. In May of 2015 ITI provided a visitor information training workshop for VIC employees from all regions of the NWT. A significant component of this training included the development of a standard information form that VIC employees will use to record and track the number of visitors to their region. Data to be collected includes a number of variables including visitor country of origin, etc. NWT Tourism will have access to this information and will include regional VIC statistics are part of its quarterly reports.

JASON VAN RUGGEN / NWTT

JASON VAN RUGGEN / NWTT



# CHALLENGES AND OPPORTUNITIES

The global economy, political unrest, visa/passport issues, air access, volatile currencies, climate change, natural disasters, competition from other tourism destination and the cost of doing business in the north (fuel, insurance, etc.) all impact tourism visitation.

A number of key challenges and opportunities that NWT Tourism has identified are listed below. Strategies to address these have been included in the 2016/17 Marketing Plan. The challenges and opportunities were identified through a variety of feedback mechanisms including data collection, dialogue with tour operators and Travel Trade representatives, feedback from Familiarization Tours hosted by NWT Tourism, conversations with representatives and stakeholders in the regions and through the ongoing feedback received from visitors contacting us through the Call Centre.

# CHALLENGES

**LIMITED TOURISM PRODUCTS** - As a result of our marketing efforts, and because the NWT offers some unique selling propositions, interest in the NWT continues to grow. Unfortunately, there is a lack of tourism product in general and export-ready product that can be purchased by the consumer or our travel trade partners. NWT Tourism needs new products and packages to market. A short tourism season, aging infrastructure, and undercapitalized operations make it challenging for many tourism operators to maintain and update their products.

**LACK OF QUALITY PHOTOGRAPHY AND VIDEO ASSETS** - As NWT Tourism shifts the marketing focus to digital and social media marketing we are challenged by having a shortage of up-to-date photos and videos that can be used to promote the NWT effectively through these channels. Working to minimize the costs associated with acquiring these resources, NWTT will work with the regions to find skilled and experienced photographers and videographers who can provide spectacular images and video footage. There are many talented photographers and videographers in the NWT and we hope to work with them to produce images that are in line with the Spectacular brand as outlined in our Visual Identity Guidelines. This past year NWT Tourism acquired photos from the Long John Jamboree in Yellowknife and photography and video from the Muskrat Jamboree/Reindeer Crossing in Inuvik. While some of the photos and videos were excellent, others did not meet our requirements.

**INCREASED COMPETITION** - As the global tourism economy continues to rise, more destinations from around the world are competing for the same tourism dollars. Brand USA has increased their presence in the international marketplace, including in Canada, and new destinations such as Iceland are aggressively marketing to Canadians. Destinations like Finland have embraced the shift towards content marketing and are making significant investments in digital and social media platforms. Most regions across Canada are increasing their marketing activities to maintain their share of the domestic market, recognizing that tourism is an economic driver. The success of NWT Tourism's Aurora marketing has been seen by other jurisdictions with similar tourism product and new and smart packaging by competitors around the Aurora heightens the need to protect our investment in this segment.

**HIGH COST OF TRAVEL** - As the NWT is a long-haul destination, the high cost of travel to the NWT coupled with the high cost of travel to move within the regions of the NWT is a significant barrier to increasing tourism to the NWT. Airline carrier fees, fuel changes, taxes and increased insurance costs result in the NWT (and all of Canada) being one of the higher cost destinations in the world. Fuel prices are also a barrier for rubber tire traffic.

**ROAD AND AIR ACCESS** - The deteriorating condition of the Liard Highway and the highway between Behchoko and Yellowknife is a deterrent to visitation to the NWT. Air access also continues to be a challenge as a number of potential domestic and international visitors to the NWT are being turned away as there are no available seats on flights to the NWT. The cost of flights and the time it takes to get to the NWT is also a deterrent to some potential visitors.

**CHANGING DEMOGRAPHICS OF THE NWT CLIENT BASE** - A number of key tourism sectors including sport fishing and outdoor adventure are seeing the average age of their client base increase. As a result the number of potential visitors in key target markets is shrinking and tourism operators are challenged with finding new markets for their tourism products.

**CUSTOMER SERVICE** - While the people of the NWT are known for being warm and friendly, customer service provided at Visitor Information Centers and local businesses can be inconsistent. As the NWT is a high cost destination, visitors expect a high level of service for their investment. Feedback to NWT Tourism's Call Centre suggests visitors are sometimes disappointed by the level of service they receive. Destinations able to deliver a high level of customer service with consistency across all its tourism interfaces as well as value for money have a competitive advantage.

**NEGATIVE PERCEPTIONS OF DESTINATION AND WEATHER** - There are many misconceptions about the NWT as a travel destination that come from the fact we are located in a cold climate area. Perceptions we have to overcome are that it is cold all the time, difficult to get to, unaffordable, that there are no or few modern amenities and there is very little or nothing to do here. The recent wildfires also have the potential to instill a negative perception of the NWT's spectacular beauty.

**LIMITED INBOUND TOUR OPERATORS AND PROACTIVE PACKAGING** - Throughout our travel to the regions, consistent feedback was that small tour operators struggle to keep their operations afloat in short summer and long winter seasons and that they need the help of an inbound operator or marketer in promoting and handling bookings and packaging their product. Specifically small operators want to work with a business and other partners to package their experience or product with others in the same community or one close by to make a unique selling proposition to potential visitors.

**THE FISHING LODGE VISITOR MARKET IS SHRINKING** - Fishing as an activity in general is on the decline across North America. NWT fishing lodge owners work to compete in a global market that is shrinking and that has an aging demographic. The lodge experience and all it has to offer has to match or beat other opportunities that are available for the same price elsewhere.

**ONGOING SUPPORT FOR THE DEH CHO TRAVEL CONNECTION (DCTC)** - Over the past few years there has been a lack of participation by BC and Alberta on the DCTC. As a result the program has lost its momentum and the partnership has been dissolved. NWT Tourism sees the Deh Cho route as an important driver for road traffic into the southern regions of the NWT, so we will continue to market the route through our own marketing efforts with Grand Prairie Regional Tourism Association.

**ONGOING FUNDING FOR THE NWT CONFERENCE BUREAU** - In the 2010/11 fiscal year NWT Tourism received a two year contribution agreement of $200,000/$100,000 per year for the establishment of a NWT Conference Bureau. NWT Tourism has successfully utilized these funds to establish the NWT Conference Bureau and has already secured $1.3 million dollars in future conference revenue to the NWT since officially launching the bureau in January of 2010. As the contribution agreement sunsets on March 31, 2012, NWT Tourism is at risk of having to reduce our marketing budgets further unless a new funding agreement is secured.

# OPPORTUNITIES

**WORLD-CLASS ICONIC ATTRACTIONS** - The NWT has no shortage on iconic attractions. We are known as the best place to view Aurora and have established the NWT as the Aurora Capital of the World. The NWT is home to two UNESCO World Heritage Sites (Nahanni National Park Reserve and Wood Buffalo National Park). The legendary Dempster Highway, the Canol Trail and the majestic rivers of the Sahtu along with the vibrant culture of Aboriginal communities in all five regions offer many attractions and/or experiences that resonate with visitors from domestic and international markets.

**INCREASED INTEREST AND AWARENESS OF THE NWT** - The heightened media exposure NWT has been receiving in recent years has helped to increase destination awareness. TV programs such as Ice Road Truckers, Ice Pilots and Ice Lake Rebels have contributed to the increased awareness of the NWT. In addition, the National Geographic feature that identified the Nahanni National Park Reserve as one of 20 "must see" destinations in 2014, the recent designation of Wood Buffalo National Park as the world's largest Dark Sky Preserve, and Aurora Maximum project have all helped to put NWT on the map.

**DEVELOPMENT OF NEW PRODUCTS** - While the NWT has a shortage of tourism products there is always an opportunity to create new products or strengthen attraction packages by partnering. The upcoming development of an all season road from Inuvik to Tuktoyaktuk has the potential to be developed into a fly-drive package. Partnership between Via Rail, Fraserway RV and northern airlines present the potential for creating intermodal packages that will drive visitation to a number of regions of the NWT. NWT Tourism also recognizes that festivals and events have significant marketing potential and can be packaged and promoted as one component of intermodal packages.

**POTENTIAL FOR NEW INVESTMENT IN THE NWT** - With the increase in Chinese visitation to the NWT, we are now seeing a number of Chinese businesses that are looking at investing in the NWT. If successful this will mean the development of more hotels, restaurants and possibly a conference centre that will support growth from our domestic and international markets.

**PARTNERSHIPS WITH ALBERTA, BRITISH COLUMBIA, THE YUKON AND NUNAVUT** - NWT's proximity with Alberta, B.C. and the Yukon provide many opportunities to work collaboratively to attract more visitors to our regions. The NWT is also a gateway to the Kitikmeot region of Nunavut which opens up the possibility of including pre and post trip activities in the NWT for travellers visiting this region. Partnership opportunities also include joint Familiarization (FAM) tours such as the combined Banff/Aurora tour that has been presented to the Japanese travel market to capitalize on the direct flights between Tokyo and Calgary. The Dempster Highway is also a key iconic attraction that promotes travel between the Yukon and the NWT. Other partnership opportunities include joint marketing ventures with the Yukon and Nunavut to participate in the DC's marketing programs at a reduced rate. The three territories are also working together on the development of a territory wide creation of market ready standards that will help us all to grow our export ready products.

**CANADA'S 150TH BIRTHDAY CELEBRATIONS IN 2017** - As Canada prepares to celebrate its 150th birthday in 2017 there is a heightened awareness of the opportunity to use this event to promote tourism to our domestic and international markets. Destination Canada (DC) is planning a large scale promotion targeted towards Millennials (youth aged 18 - 34). This will consist of a variety of social and digital promotions using travel bloggers and social media influencers who will visit all participating regions in Canada. Aside from the DC campaign, the NWT is looking at doing a number of its own promotions to celebrate Canada's 150th. Activities and/or events from each of the five regions of the NWT will be included in the promotion.

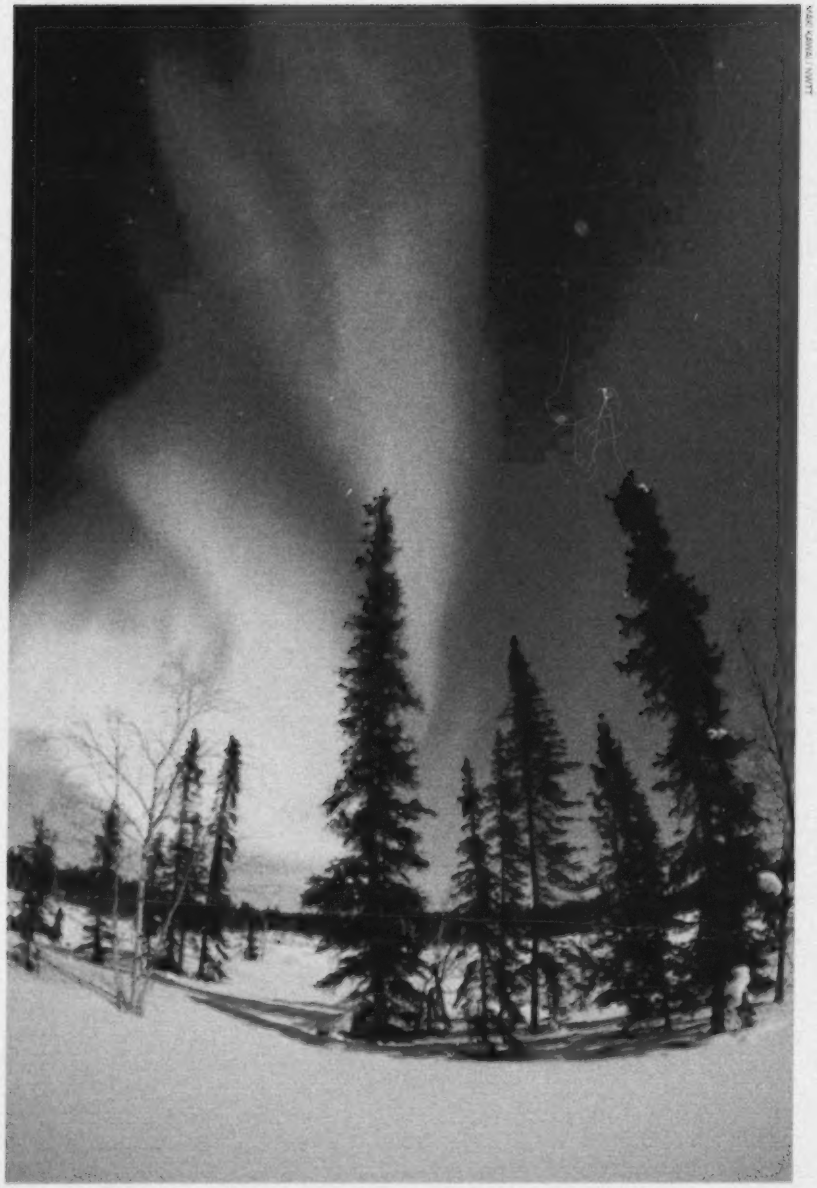
**FAVORABLE CURRENCY RATES** - A weakening Canadian dollar is making it more attractive for many international travellers to visit the NWT, particularly those from the US market.

**FISHING SECTOR RESEARCH RESULTS** - Significant market research completed in 2014 for the fishing sector has created an opportunity for lodge owners to understand the product offering expected by the highest potential markets and to fine tune their product offerings for the specific markets they are pursuing. The research has helped NWT Tourism to gain a better understanding of the demographics and psychographics of the highest potential markets which will be reflected in its marketing strategies.

**SPECTACULAR BRAND** - As the global competition for travel dollars heats up and multiple platforms are being used to reach and motivate customers to choose their travel destination, having a strong brand with a clear voice is vital to set the NWT apart from rival destinations. The brand must be backed by a reputation for excellence in providing quality experiences, service and value. Working closely with regional stakeholders and partners and with the regional offices of the Department of Industry, Tourism and Investment, NWT Tourism has made a commitment to revitalize the look and execution of the Spectacular Brand in all marketing collateral. The revitalization will include developing guidelines for the use of the brand by partners, members and other stakeholders. This will ultimately strengthen the voice of NWT Tourism and position the NWT as a unique travel destination.

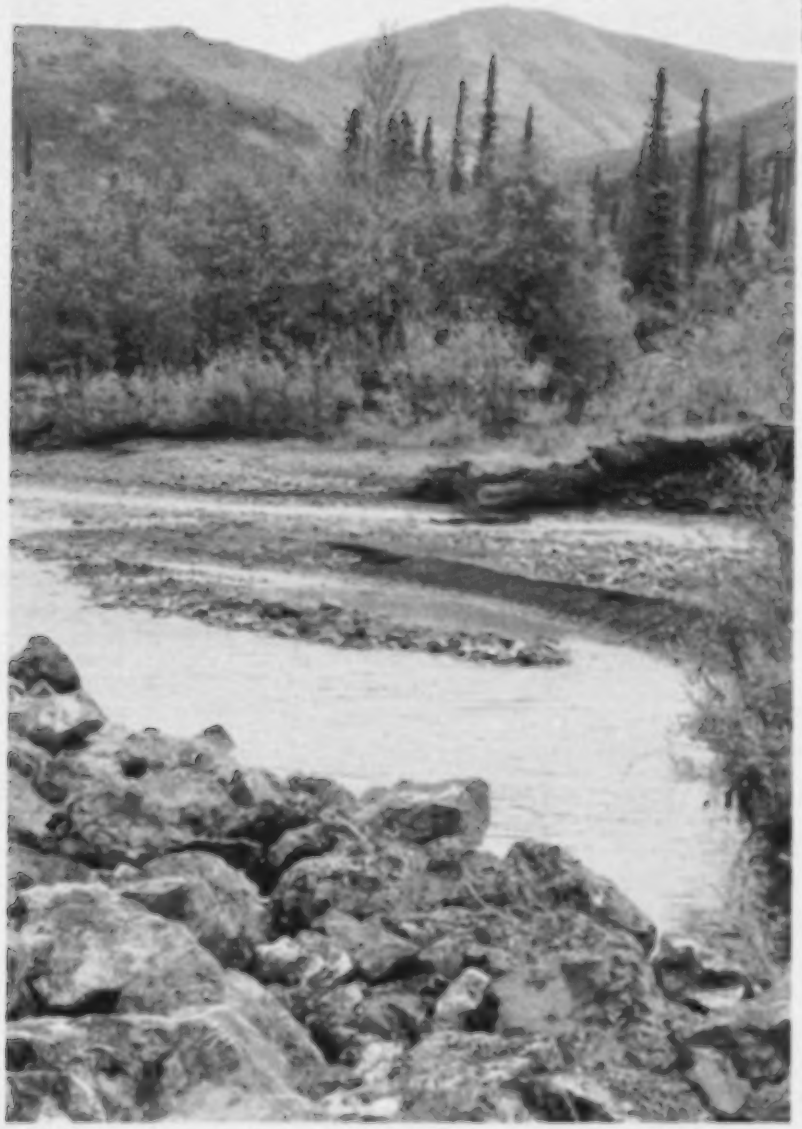
**DEVELOPMENT OF A FIVE YEAR MARKETING STRATEGY** - With the support of CanNor funding, NWT Tourism is in the process of developing a five year marketing strategy which will be completed in January 2016. Having this strategy in place will enable NWT Tourism to identify product gaps and assess long term funding needs in order to achieve our goals and objectives.

**SPECIALIZED GROUP TRAVEL** - Special interest groups, alumni associations and school groups are niche markets that have the potential to be a good fit for the NWT. Many of these groups are looking for authentic experiences and are often willing to pay a premium price to get them. Many of these groups can be reached directly through consumer channels and do not necessarily require our local tourism operators to be working with the travel trade.



# TOURISM PRODUCT IN THE NWT

The Northwest Territories is a spectacular destination with a small variety of unique, world-class tourism products. These key products put the NWT on potential tourist's wish lists. There are five specific sectors that NWT Tourism promotes to our key domestic and international markets. These include Aurora, Sport Fishing, Outdoor Adventure, Touring and Hunting. Aboriginal culture and history currently fit within the touring sector but may become its own sector as more products are developed. All tourism products are promoted under five main categories or icons. These include Aurora, Parks and Wilderness, Lakes and Rivers, Culture and People and Northern Realities. These categories are utilized by NWT Tourism as they personify the Spectacular Northwest Territories Brand. In order to be competitive in a global marketplace the NWT will need to work towards the development and expansion of new and existing tourism experiences. All products need to be positioned as experiences that will captivate the interest of the modern traveller. As a high-cost destination, NWT Tourism understands that a focus aimed at attracting a demographic who are willing to pay for an authentic experience is important as we are not able to compete for potential visitors based on price.



# MARKETING TOURISM IN THE NORTHWEST TERRITORIES

In order to keep pace with current marketing trends and to remain relevant to our target markets it is imperative that NWT Tourism adjust its marketing strategy. Relying solely on traditional marketing techniques is no longer effective. Digital technology and social media are gaining more prominence in today's society and the consumer is looking for more of an interactive experience when they are selecting, purchasing, participating in and sharing their travel experiences. It is no longer enough for tourism destinations to have static websites as consumers are looking to be inspired by photos, videos and travel blogs and are looking for relevant content that is fresh, innovative and updated on a regular basis. As NWT Tourism has not kept pace with this trend, we have seen a significant decline in the number of

visitors to our website. While advertising campaigns carried out in the fourth quarter of the 2014/15 fiscal year drove up the number of unique visitors to the spectacularnwt.com website, visitation to the site dropped significantly once the ad campaigns were completed. The website does not have enough inspiring content to keep people coming back to the site.

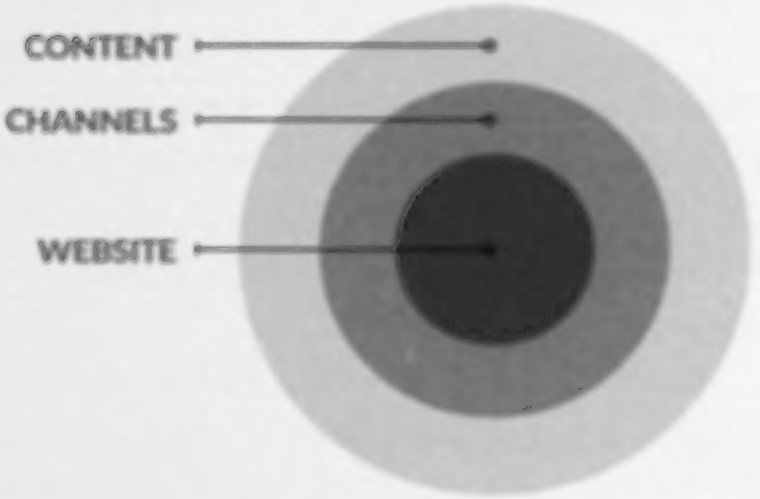
# CONTENT MARKETING

In traditional tourism marketing the Destination Marketing Organization (DMO) talks to people (one-way), whereas in content marketing there is a two-way conversation between the DMO and the consumer. The challenge of content marketing is to find the area of common ground/relevance between the DMO messaging and consumer interests.

There are three key components to content marketing. These include: the actual content being developed (photos, videos, blogs, travel stories, etc.), the website that hosts the content, and the distribution channels (print and web advertising, social media) that drive the consumer to the website that hosts the content.

In order for content marketing to be successful, the website must be updated constantly with fresh content that inspires potential visitors to consider travelling to the NWT.

## KEY COMPONENTS OF CONTENT MARKETING



## WHERE TO CAST YOUR NET

There are a number of key reasons for moving from traditional marketing to content based marketing. As the marketplace has evolved content based websites are more relevant and interesting to the consumer. As a result websites that are based on content marketing are rewarded by Google Analytics and are showing up much higher in Google searches. Many of our key competitors have embraced the move to content marketing and they are doing it very well. By not keeping up with this trend we are in danger of being left behind.

Content also provides the DMO with easy access to performance metrics and the ability to evolve, set targets, and develop new content and messages based on the success of each individual campaign.

Content marketing also gives the DMO the opportunity to target very specific markets, and the ability to engage in one on one conversations with interested consumers. In the past NWT Tourism was limited to taking out large scale ads targeted at broadly defined relevant demographics. For example, to target the sport fishing sector we would place a print or web advertisement targeted at a large demographic, such as Canada or the Midwestern US. With content marketing the market can be narrowed down to a specific market such as Canadian women who fly fish.

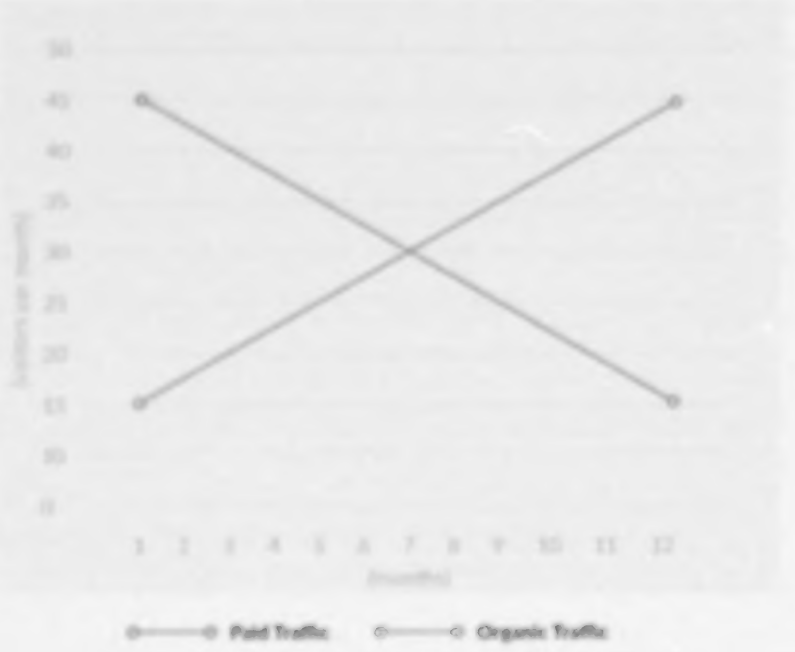
The initial move to content marketing will require a significant investment in paid advertising to drive traffic to the content based website, but over time paid traffic will be reduced and replaced by organic traffic as visitors to the website will share the content with their peers and content gains traction in the search engines, which will generate additional visitation to the website. The key is to have inspiring content on the site that is relevant to the consumer and tied directly into NWT Tourism's advertising campaigns.

Moving towards a content marketing approach will require a significant shift in how NWT Tourism structures its marketing activities. Content marketing will focus on five key functions, explained in the model that follows. These include the functions of Content Management, Content Writing/Editing, Community Management, Digital Advertising and Content Contributors.

These functions will be carried out by NWT Tourism and our Agency of Record. Having the appropriate content management in place will ensure that the right content is developed, that content is in line with the Spectacular brand and that content is deployed to the right markets. Content management will also consist of constant monitoring and evaluation of markets and strategies, setting priorities and tactics, reviewing metrics and the level of engagement of the target communities. NWT Tourism will work closely with all regional representatives who are providing content to ensure NWT Tourism has a steady supply of captivating content that can be pushed out through digital and social media distribution channels.

## WHY CONTENT MARKETING?

**Paid versus organic traffic**



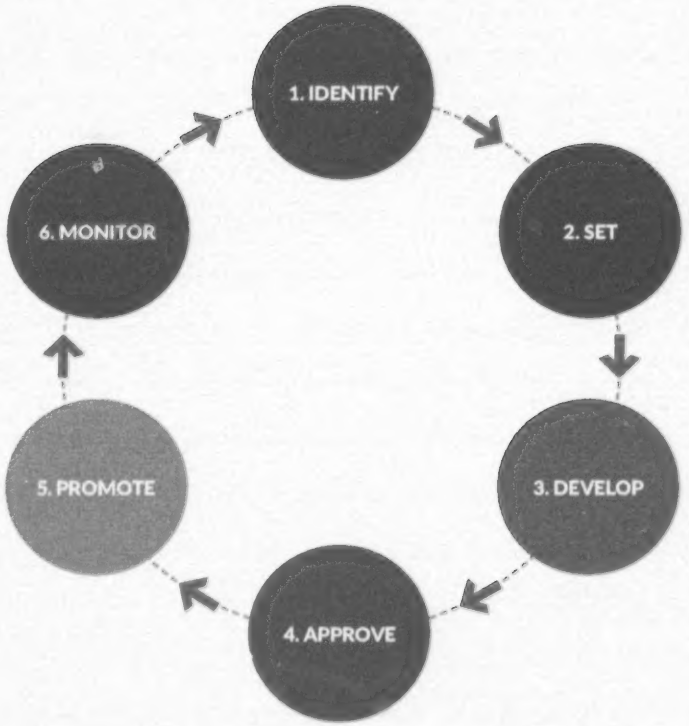
## CONTENT MARKETING FUNCTIONS

Content writing/editing will include the creation of editorial guidelines so that all content is delivered in the same voice, managing freelancers and contributors, writing and/or editing content to ensure it is in line with the Spectacular brand and finding photographs and video to support the content marketing messages. The community management function handles one-on-one engagement within NWT Tourism social media channels, identifies key influencers, posts social media content and reports on social engagement. Digital advertising will focus on drawing traffic to the spectacularnwt.com website through a variety of paid promotions. This will include identifying keyword trends and opportunities, the design and placement of all advertising, daily monitoring of digital metrics and monthly reporting on all campaign results. Content contributors will consist of a variety of tourism stakeholders, communities, and travel writers who provide ideas, text, images and video content aimed at inspiring visitors to come to the NWT.

For content marketing to be successful it will require a committed partnership between NWT Tourism, its tourism stakeholders and its regional representatives. It will be important that information and content such as new operators, new products and services, special events, FAM tours, photography, video, story ideas and other inspiring content be shared with the team at NWT so that they can produce and/or share this content on the spectacularnwt.com website and through all of NWT Tourism's social

media channels. NWT Tourism to planning to have regular meetings with regional partners to ensure we are up to date on what is happening in all of the regions and get information that can be developed to fit into the content marketing plan. NWT Tourism will develop checklists and prompts to assist all contributors and stakeholders to understand what kind of information is relevant to tourism content marketing.

The first step in the content marketing cycle involves identifying key markets and their specific needs and interests. This will include drilling down to specific segments within key target markets and determining the best channels to use to communicate with these markets. The following steps are to set the content voice in which we converse with our markets, and to develop, approve and post/promote the content. Finally, the posted content is then monitored and adjusted as necessary.



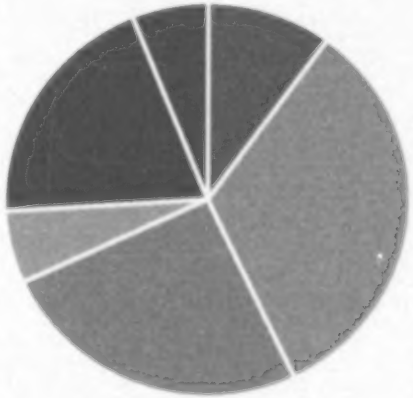
# MOVING TOWARDS A CONTENT MARKETING STRATEGY

As we prepare to move towards a content marketing strategy, NWT Tourism will be making adjustments to our spectacularnwt.com website so that the required functions will be in place to support content marketing. This will involve a revamp of the main page of the spectacularnwt.com website so that it features more content. It also means building new functionality within the website to allow visitors to post and share stories. Other functionalities to be added include interactive regional maps, developing destination pages, building more metrics and tracking conversions. In order to prepare for content marketing in 2016-17, the ongoing work on our website in the previous fiscal year has taken this future tactic into consideration so NWT Tourism is positioned well for implementation of content marketing.

A typical content based marketing budget will consist of program set up, creation of the content, digital advertising to drive traffic to the content on the website, administration and reporting, managing social media channels and ongoing market evaluation. Content creation requires the largest portion of the budget, followed by digital advertising. As the website and social media channels grow in popularity, the digital advertising budget can be reduced and reallocated to additional content creation.

## TYPICAL 1ST YEAR BUDGET BREAKDOWN

- Program Setup - 10%
- Content Creation - 33%
- Digital Advertising - 25%
- Administration/Reporting - 6%
- Community Management - 20%
- Ongoing Market Evaluation - 6%



# DISTRIBUTION CHANNELS

NWT Tourism will continue to utilize the channel approach to reach its key target audiences. There are four main marketing channels that are standard in the tourism industry. These include consumer, media and public relations, travel trade, and meeting and incentive travel (MC&IT). While content marketing is primarily focused on consumer direct marketing, NWT Tourism will incorporate the content marketing strategy in each of the four channels.

CONSUMER – NWT Tourism's marketing efforts focus on a content marketing strategy that will build destination awareness and position the NWT as a world class travel destination and highlight iconic products and experiences in the NWT. The primary geographic focus will be Canada and the US. Consumer marketing in overseas markets will focus on niche advertising media that are dedicated to specific tourism sectors and/or repeat visitors to Canada. The NWT Tourism content marketing strategy will include a mix of destination awareness, regional marketing and sector based promotions.

NWT Tourism will carry out various marketing activities that will enable it to reach its target audiences. These include:

- Content creation and promotions
- Advertising (digital and print)
- Social Media
- Experiential Marketing
- Consumer Shows
- Market Research

Keeping in line with the content marketing strategy, the first priority will be the acquisition of content. This includes acquiring photography, videos, stories, blogs, the development of popular lists of tourism activities (i.e. Top 10 lists), etc. This content will be used as the hub for all promotions and predominately be housed on the spectacularnwt.com website. Traditional advertising will still be used to drive traffic to the NWT Tourism website. Over time, traditional advertising will become less important as destination awareness is built and shared through content marketing programs. Print advertising will then be significantly reduced in favor of digital and social media marketing. Consumer marketing will focus primarily on the Canada and US markets, with several small campaign taking place in NWT Tourism's primary markets. It will be imperative for advertising activities be directed to specific landing pages on the spectacularnwt.com website that further engage the consumer. For example, in the past NWT Tourism placed a print or digital ad that promoted a specific region/activity such as Virginia Falls in Nahanni National Park Reserve. The call to action was the general spectacularnwt.com website, and the consumer would have to sort through the information on the page to find out more about the Nahanni. Using content marketing the same ad will now drive the consumer to a specific feature article on Nahanni National Park Reserve and/or inspiring photos and videos of the location. The use of social media will further expand the reach of marketing initiatives. Newly developed content will be shared on the appropriate social media channels using the right voice to engage the target audience in meaningful dialogue.

NWT Tourism will also use a variety of experiential marketing campaigns to support the content marketing strategy. Typically experiential marketing consists of small scale events or one-off marketing activities that capture the attention of the consumer. A great example of this is NWT Days. A team of people and husky dogs approached people on the streets outside of the Ottawa Conference Centre and encouraging them to visit the NWT exhibit at the event.

As the marketing focus shifts to content marketing, NWT Tourism's attendance at consumer shows will be reduced. NWT Tourism will focus on acquiring space at consumer shows where local tourism operators have reported a good return on their investment in the past. NWT Tourism staff will only attend consumer shows that the NWT has not previously participated in as it will be important for NWT Tourism to assess the market potential for these shows. NWT Tourism will use social media channels to promote the NWT before and during these shows.

Market research is another key component of developing a successful marketing plan. Research offers key insights into a variety of market demographics and how best to communicate with individuals in the various target groups. For several years the CTC has been spearheading the Explorer Quotient (EQ). This innovative research tool goes beyond traditional research to discover why people travel and why different types of travellers seek out entirely different travel experiences. The research delves into personal beliefs, social values and views of the world and how these factors determine what types of travel experiences certain types of people seek. Knowing this information will enable tourism operators in the NWT to develop experiences that match the needs of specific target markets, and will also enable NWT Tourism to structure marketing messages in a way that appeals to the correct target markets. The EQ program has been in place at the CTC for several years and is gaining popularity with the various DMOs across Canada. NWT Tourism has committed to investing in the EQ program and will be working closely with the CTC to ensure NWT Tourism and its local tourism operators have the necessary tools in place to make effective use of this research product.

NWT Tourism will also use market research to track and report on content performance, identify a correlation between market interests and content views, measure conversions of package sales, measure digital campaign and social media performance and to establish visitor demographics and affinities. Market research will also enable NWT Tourism to identify relevant influencers that have the potential to expand its market reach and following.

**MEDIA AND COMMUNICATIONS** – Media and communications plays an important role in the success of any travel destination. The media coverage provided by travel writers and broadcast journalists results in a far greater reach than paid advertising can buy and it also provides a voice of authenticity which appeals to readers. Over the years NWT Tourism has successfully worked with a wide variety of media partners which has resulted in significant media coverage on the NWT as a travel destination. In the past NWT Tourism has measured media value in terms of the dollar value it would have cost the association to purchase the equal amount of paid advertising space. As NWT Tourism shifts to content marketing, audience reach and circulation is increasingly important. NWT will therefore measure success on the circulation and reach of the media coverage being produced.

NWT Tourism's media and communications strategy includes the following activities

- Build relationships with key travel media
- Host media FAM tours from NWT Tourism's primary and secondary markets with the intent of acquiring inspiring content on all regions and for all sectors of the NWT. Ideally, depending on rules for acquiring rights to the content, the content will be showcased on spectacularnwt.com, the recently developed foreign-language websites and be promoted through NWT Tourism social media channels.
- Purchase high quality photos and video and negotiate photo and video rights from travel media who visit the NWT whenever possible as a way to acquire the assets needed to support the content marketing strategy

- Attend media marketplaces to qualify journalists for FAM tours and to identify key social media influencers who can be utilized to promote the NWT as a travel destination
- Use public relations strategies to support all marketing efforts and to build awareness of the value of NWT Tourism to the local economy and to the tourism industry in the NWT.
- Use traditional newspaper media outlets and public relations initiatives to extend the reach of marketing activities.

NWT Tourism's media investments will focus on its primary and secondary markets. Approximately 35% of the media FAM budget will be allocated to Canada and the United States, with the remaining 65% of the budget allocated to Japan, China, Korea, Germany, Australia and France. The budget is higher for the European and Asian market due to higher travel costs and more markets to reach. Whenever possible NWT Tourism will work closely with the CTC and its general sales agents to ensure that travel media that have the greatest potential to support the content marketing strategy are selected. NWT Tourism will continue to partner with the CTC in international markets whenever possible. The CTC typically supports the flight costs of getting the travel media to the NWT. NWT Tourism, in partnership with local tourism operators, cover the remaining costs of hosting international media.

Travel writers typically identify what products and experiences they are looking for and this is often based on a story they have secured for a travel publication. NWT Tourism strives, whenever possible, to create a diverse media program so that all regions and sectors in the NWT receive media coverage. NWT Tourism selects media whose outlets reach the audiences in its primary and secondary markets. NWT Tourism will identify content and marketing collateral (photos, videos, etc.) gaps prior to developing the media FAM program for the coming year. One goal of the media program will be to negotiate with travel media to develop resources to fill these gaps whenever possible.

**TRAVEL TRADE** – The travel trade continues to be an important component of the marketing plan, particularly in overseas markets where consumer marketing is not efficient and is cost prohibitive. In several of NWT Tourism's key markets, such as Germany and Japan, over 85% of visitor bookings are done through tour wholesalers or travel agents. NWT Tourism benefits from working with the travel trade, as they have significant sales networks and specific knowledge of their clients who are a good fit for NWT tourism product. NWT Tourism will utilize its content market strategy and direct its key trade accounts to inspirational content on spectacularnwt.com websites that match the interests of the their clients.

NWT Tourism's Travel Trade plan includes the following activities

- Attend key travel trade marketplaces where NWT Tourism meets with representatives from important travel trade accounts and identifies new potential partners. These marketplaces provide the perfect opportunity to build destination awareness with tour wholesalers from the secondary and emerging markets.
- Provide regular updates to the travel trade related to export ready product in the NWT and encourage the travel trade to carry and sell NWT products.

C-GPMS

- Host key travel trade accounts on FAM tours to the NWT to showcase export ready product, leading with our best.
- Establish cooperative marketing partnerships with key trade accounts. Cooperative funding will be contingent on a travel trade companies having innovative programs, the potential to generate sales and a commitment to provide follow-up reports and performance metrics.
- Develop a wide range of promotional content that the travel trade can use to sell the NWT to their clients. This will include developing sample travel itineraries, expanding the NWT Tourism photo and video libraries, developing links to specific travel stories related to the NWT and providing sample packages that can be sold through the travel trade to various international markets.

The CTC Global Tourism Watch: 2013 Canada Summary Report indicates that less than 10% of Canadians use the services of the travel trade when booking domestic travel. Therefore, NWT Tourism's primary focus for travel trade activities will be in its international markets.

MCIT – MCIT plays a key role in generating visitor revenues to the NWT. Since officially opening at the end of January, the NWT Conference Bureau has generated over $1.3 million in conference revenues with an additional $1 million under negotiation. Marketing efforts will continue to focus on attracting mid to small size meetings and conferences and on promoting the NWT to incentive houses that are looking at new and innovative ways to reward their top clients.

NWT Tourism will utilize content marketing to develop a variety of photographs, videos and stories that will be used to communicate the unique experiences available as pre and post meeting or conference activities in the NWT.

Key activities for the MCIT program include

- Promote the NWT Conference Bureau and the services it provides
- Enhance the Conference Bureau website that conference planners and incentive houses can use to assess the fit between the NWT and their client's needs.
- Attend key MCIT trade shows to meet with key meeting and conference planners.
- Update NWT Tourism promotional displays to gain more attention at shows and other events
- Participate in Meeting Professional International (MPI) and the Canadian Society of Association Executives (CSAE) associations to stay connected with current MCIT research and trends.
- Host FAM tours and site visits for key MCIT accounts
- Work with local industry partners to respond to RFPs for organizations looking to host a meeting or conference in the NWT.
- Explore the possibility of using social media channels to reach this market (ie: Twitter business account)

The Business Events Canada (BEC) division of the CTC has recommended that NWT Tourism reach out to industries such as natural resources and partner with their trade departments, consulates and embassies targeting trade events, offering to host trade missions and sharing contacts.

From an incentive perspective the strategy is aimed at marketing to smaller companies that are willing to try "out of the box" destinations with a focus on specializing on an experience such as Aurora viewing, outdoor adventure or sport fishing incentives. Festivals such as the Great Northern Arts Festival, Paddlefest and the Long John Jamboree can also be promoted as incentive travel product offerings.

With the establishment of the NWT Conference Bureau, NWT Tourism has created greater efficiencies and has been able to bring marketing and sales expertise in-house so that current marketing budgets can be better allocated toward the development and sale of tourism packages.

# MARKET CLASSIFICATION

With over 240 nations around the world, choosing which markets the NWT should target can be overwhelming. Working closely with the CTC, NWT Tourism focuses its international marketing efforts where the Canada brand has a strong presence. The CTC is currently active in eleven international markets. These include the United States, United Kingdom, France, Germany, Australia, Japan, China, Korea, Mexico, Brazil and India. Due to budget cuts following the 2010 Winter Olympics, the CTC reduced its presence in the USA marketplace to MCIT and a few media activities. During Rendezvous Canada the CTC announced that they have received $30 million in funding over a three year period to reinvest in the US market. The CTC has reached out to the provincial and territorial DMOs across Canada to seek feedback on the approach they should take to re-enter the US market. They have recently announced that the CTC will be using a content based marketing approach. Sport fishing will be one on the experiences the CTC promotes in the US. NWT Tourism will be looking at investing in the CTC's promotional campaigns once they have been established.

Markets that the CTC is not active but which are markets for NWT Tourism include Switzerland and the Netherlands.

NWT Tourism selects geographic markets based on a number of criteria including: a strong match between the specific products that a market is looking for and the NWT's ability to deliver these products, demographic matches (age, income, education, etc.), current visitation statistics, travel trends, visa/passport requirements, and air access. A comprehensive overview of each of these markets are outlined in Appendix A.

Based on the above criteria, Northwest Territories Tourism has categorized its geographic markets as follows.

## PRIMARY MARKETS

- Canada
- United States
- Japan
- Germany
- China

**Marketing Channels: Consumer, Media, Travel Trade and MCIT**
Consumer activities in international markets will be led by the CTC and/or will focus on small niche campaigns

A significant portion of the budget will be spent on domestic marketing with smaller budgets allocated to the international markets. NWT Tourism will be creating marketing programs that will develop content for its marketing initiatives and promote this content on the various NWT Tourism websites and through social media channels.

## SECONDARY MARKETS

- Switzerland
- South Korea
- Australia
- France

**Marketing Channels: Media, Travel Trade, Consumer**
Consumer activities will be limited to content generation that can be promoted on the NWT Tourism foreign language websites.

## LONG TERM MARKETS

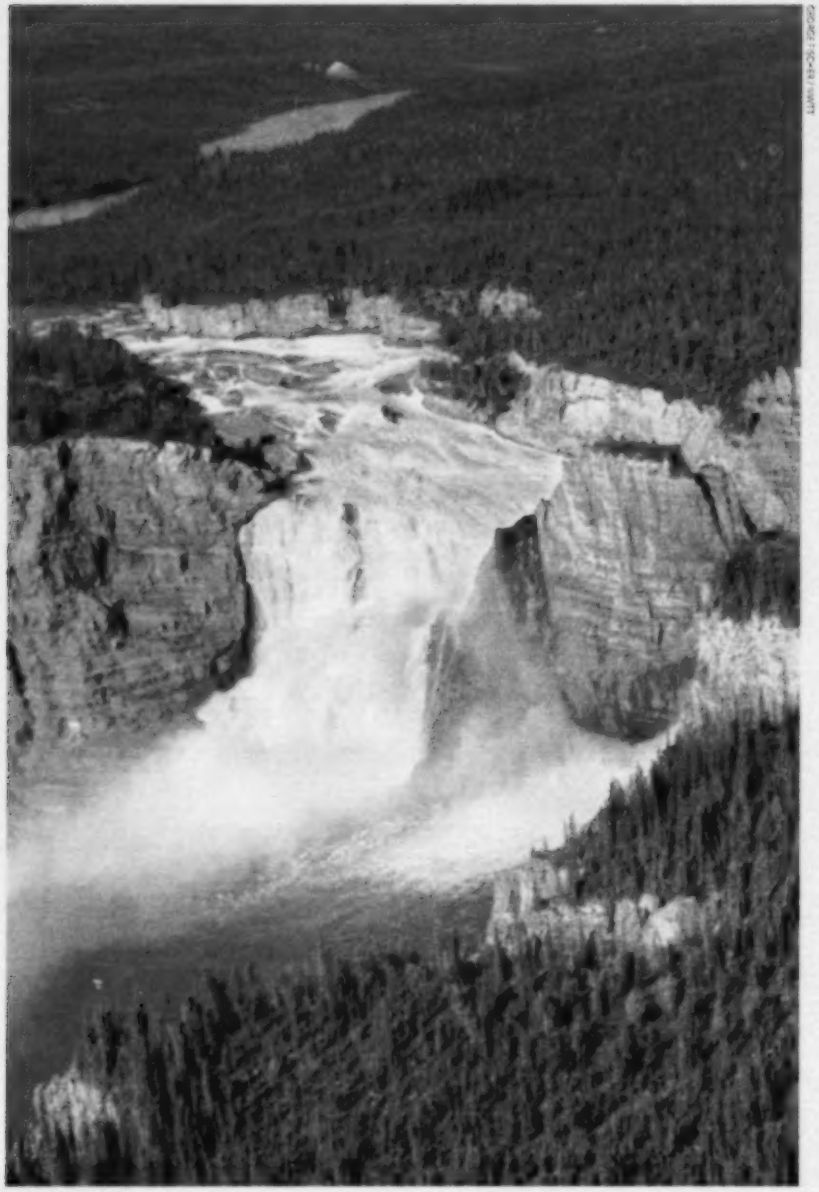
- United Kingdom

**Marketing Channels: Media, Travel (limited to CTC events and trade enquiries)**
NWT Tourism will be looking to expand the secondary and long term marketing activities if additional funding is received (i.e. CanNor).

## OTHER MARKETS

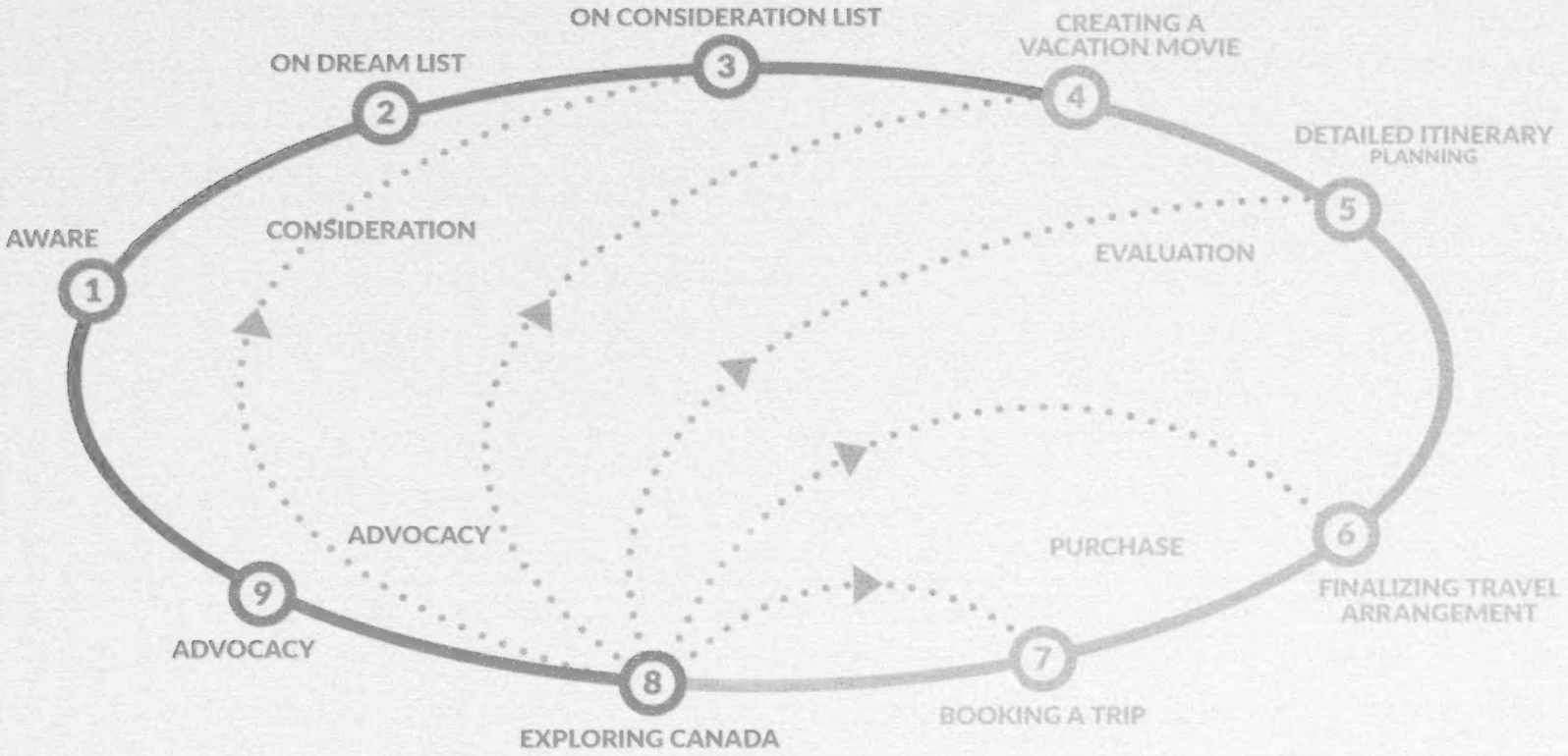
- Mexico
- Brazil
- India
- Netherlands

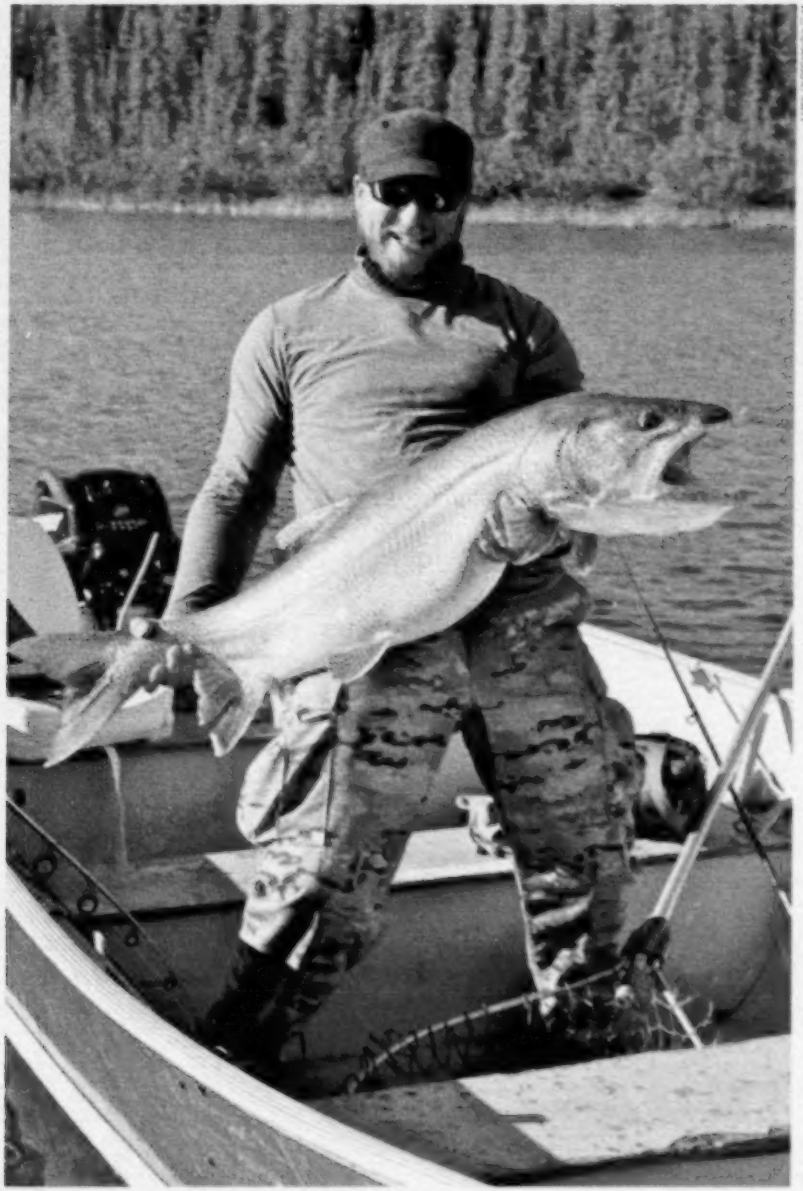
*No planned in-market activities. NWTT may be able to assist tour wholesalers and receptive tour operators already selling NWT product.



# PATH TO PURCHASE MODEL

Several years ago the CTC adopted a path-to-purchase model as a way of influencing travellers to visit Canada. The path-to-purchase model identified progress and blockages to building destination awareness, consideration, and evaluation, planning and ultimately booking a trip to Canada. With mobile and digital technology changing at a rapid pace consumer behavior associated with purchasing travel may very well change. NWT Tourism will be requesting that the CTC revisit the path-to-purchase model to determine if technology has influenced this process, and if so, what adaptations the DMO needs to make to ensure they are providing the right messaging at an appropriate time to our target markets.


AWARE
1
ON DREAM LIST
2
ON CONSIDERATION LIST
3
CREATING A VACATION MOVIE
4
DETAILED ITINERARY PLANNING
5
FINALIZING TRAVEL ARRANGEMENT
6
BOOKING A TRIP
7
EXPLORING CANADA
8
ADVOCACY
9
CONSIDERATION
EVALUATION
PURCHASE
ADVOCACY





# FUNDING SOURCES

The 2016/17 Marketing Plan funding is divided into two main sections. These include: (1) Core Marketing, and (2) NWT Conference Bureau. These sections are each covered in separate funding agreements which NWT Tourism has with GNWT ITI. NWT Tourism has also included a brief overview of Tourism 2020 below. While CanNor funding (if received) would be separate from the ITI contribution agreements, marketing programs undertaken with CanNor funding would complement and enhance NWT Tourism marketing efforts undertaken through ITI contribution agreements.

## CORE MARKETING

The core marketing program is carried out using funds in the main contribution agreement from GNWT ITI. This program targets all of the main geographic markets, with the primary focus being on the Canada and US markets followed by the primary international markets (Japan, Germany and China), and with smaller investments in a number of secondary markets (Switzerland, South Korea, Australia and France). Core marketing will follow the channel approach with the largest budget being allocated to consumer marketing. Consumer marketing will focus on content based marketing and will highlight all regions and tourism sectors within the NWT. The media, travel trade and MCIT marketing channels will also be utilized with the MCIT channel focusing on Canada and

the USA, trade marketing focusing on NWT Tourism key overseas markets and media covering all primary and secondary markets. Content marketing will be incorporated in all channel marketing efforts.

## NWT CONFERENCE BUREAU

In June of 2014 NWT Tourism signed a two-year agreement for $200,000 with GNWT ITI ($100,000 per year) for the development of a NWT Conference Bureau. As part of the development process NWT Tourism staff visited the communities of Inuvik, Norman Wells, Hay River, Fort Smith and Fort Simpson in the summer and fall of 2014 and met with a variety of stakeholders to provide information on what the Conference Bureau is and how it works. Conversations were focused on the best practices used by NWT Tourism to attract and host meetings and conferences in the NWT. Potential venue information was gathered in the communities on these visits for inclusion on the Conference Bureau micro-site which was officially launched in January of 2015. In the short time the NWT Conference Bureau has been in place it has generated over $1 million dollars in confirmed revenue with an additional $1 million dollars of additional conference revenue in negotiation.

The two year funding agreement sunsets at the end of the 2015/16 fiscal year. NWT Tourism is respectfully requesting that the contribution agreement be renewed. NWT Tourism has restructured its organization to take on the role of the NWT Conference Bureau and without funding support for the Conference Bureau the success of other marketing activities would be jeopardized as core budget marketing dollars would need to be reallocated to maintain the NWT Conference Bureau without a renewed contribution agreement.

## TOURISM 2020

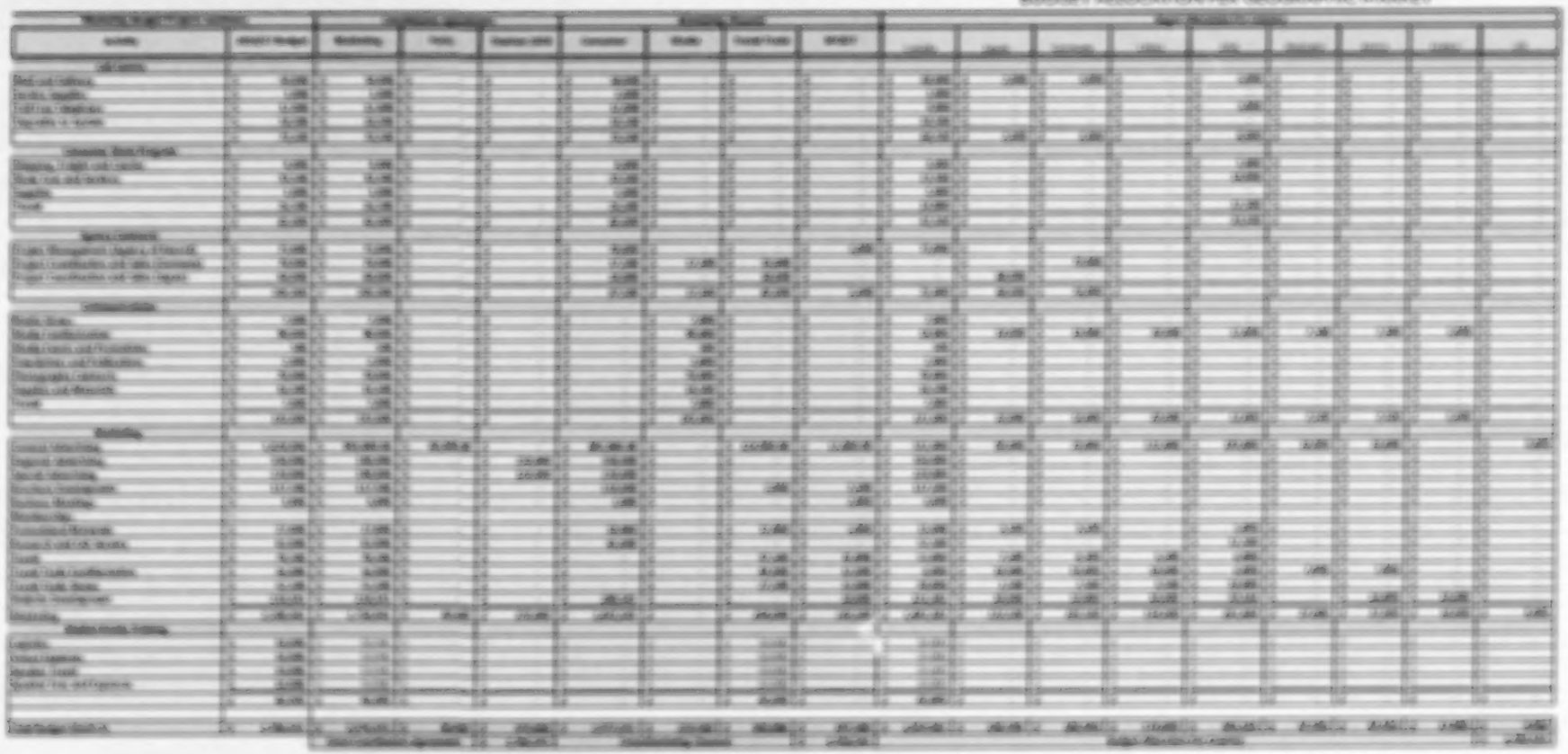
As part of their Tourism 2015 strategy GNWT ITI allocated an annual budget of $400,000 in a separate contribution agreement with NWT Tourism. This contribution agreement stipulated that the allocation of these funds was to be directed by ITI in consultation with NWT Tourism. Initiatives undertaken with these funds have included specific regional marketing projects, special marketing initiatives such as NWT Days in Ottawa, and local marketing. Tourism 2015 sunsets at the end of the 2015/16 fiscal year and NWT Tourism has not received confirmation that this same marketing budget has been allocated to Tourism 2020. NWT Tourism has therefore not budgeted any funds from Tourism 2020. If NWT Tourism does receive a contribution agreement for Tourism 2020, budgets would be adjusted based on the stipulations of the agreement.

## CANNOR

In the 2014/15 fiscal year, NWT Tourism received $1.4 million CanNor funding for a period of two years ($ 700,000 per year). The funding is being utilized for the development of five year strategic plan, brand management, enhanced sport fishing promotions, establishment of a Conference Bureau micro-site, enhanced marketing in key international markets (Japan, China and Germany) and funding to expand into new markets (Australia, Korea, France and the UK). With the funding agreement coming to an end on March 31, 2016, and recognizing that the upcoming federal election may result in a lapse in funding during the 2016/17 fiscal year, NWT Tourism has reduced its core marketing budgets slightly to maintain a presence in the newly established international markets until additional CanNor funds are secured.

# BUDGET SUMMARY

The 2016/17 NWT Tourism Marketing Plan budget is divided into four separate section. These include Marketing Budget Projects Summary, Contribution Agreements, Marketing Channels and Budget Allocation Per Country. The Marketing Budget Projects Summary is an overview of the entire marketing budget and the various activities that will be used to carry out the plan. The Contribution Agreements section shows the breakdown of marketing activities based on funding source. The Marketing Channel budget outlines the budgets for consumer, media, travel trade and MC&IT promotions. Finally, the budgets have been broken down for each of our primary and secondary markets.



APPENDIX A

# KEY ACTIVITIES

## CONSUMER PROMOTIONS - ACTIVITY REPORT

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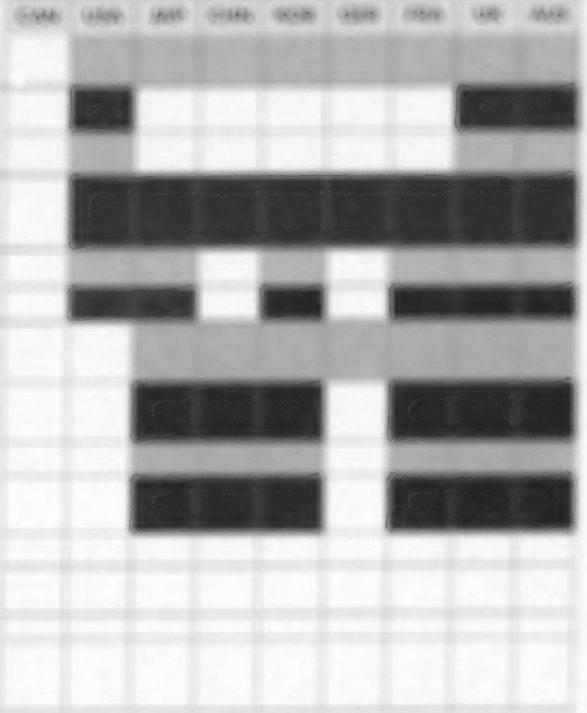
| [illegible] | [illegible] |  |

[illegible]

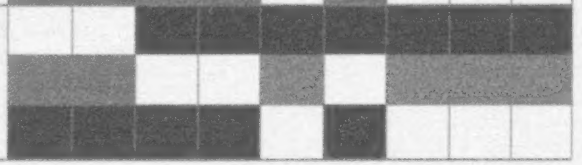
## CONSUMER PROMOTIONS - METRICS REPORT

| TACTIC | KEY OUTPUTS | ACTIVITY COMPLETED | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | CAN | USA | MP | CHN | HDR | GER | FRA | UK | AUS |
| **NWTT Websites** | • To increase the number of unique visitors to the main website by 10% (annually) | | | | | | | | | |
| | • To increase the number of jump offs from the NWTT main website to our local tourism operator websites by 10% (annually) | | | | | | | | | |
| | • To increase the number of unique visitors to our foreign-language websites by 5% (annually) | | | | | | | | | |
| | • To set a baseline for our newly created international-language websites | | | | | | | | | |
| **Social Media** | • To increase the number of followers on our social media accounts by 10% (annually) | | | | | | | | | |
| | • To generate qualified leads for our social media accounts | | | | | | | | | |
| | • To increase engagement on our social media accounts by 5% (annually) | | | | | | | | | |
| **Integrated Advertising** | • To maintain our market reach in the markets were are actively marketing to the consumer direct promotions | | | | | | | | | |
| | • To measure content engagement (Doug) | | | | | | | | | |
| | • To increase inquiries to our call centres by 10% (annually) | | | | | | | | | |

# MEDIA PROMOTIONS - ACTIVITY REPORT

| TACTIC | KEY OUTPUTS | ACTIVITY COMPLETED | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | CAN | USA | JAP | CHN | KOR | GER | FRA | UK | AUS |
| **Travel Media Support** | • To respond to all travel media inquiries ( number of inquiries will be included in each quarterly report)<br>• To respond to all photo video requests (number of photo/video request will be included in reports) | | | | | | | | | |
| **Media Shows** | • To Attend Go Media Marketplace<br>• Promote NWT as a tourism destination to 30 domestic and international travel writers during pre-selected appointments<br>• To Generate 5 qualified leads for the NWTT Media FAM program<br>• To host 6 Media FAMs from Canada and the USA | | | | | | | | | |
| **Media FAM Program** | • To host 1 Media FAM from each of our primary and secondary overseas markets<br>• To ensure that all regions and sectors are featured in our Media FAM program | | | | | | | | | |
| **Media Assets** | • To identify two significant video gaps that limit our marketing promotion of the NWT's tourism product<br>• To coordinate up to two photo/video shoots to address these gaps<br>• To acquire 50 new high-resolution images and video<br>• To acquire 5 new HD videos and/or B roll for future promotions | | | | | | | | | |

## MEDIA PROMOTIONS - METRICS REPORT

| TACTIC | KEY OUTPUTS | ACTIVITY COMPLETED |
|---|---|---|
| | | CAN · USA · JAP · CHN · KOR · GER · FRA · UK · AUS |
| **Media Value** | • To generate over $2 Million in media coverage from our Canadian and USA markets<br>• To generate over $100,000 in media coverage from our primary overseas markets<br>• To generate over $50,000 in media coverage from our secondary overseas markets | |
| **Media Circulation** | • To reach a target audience of 10 Million people from Canada and the USA<br>• To reach a target audience of 2 Million people from our primary overseas markets<br>• To reach a target audience of 500,000 people our secondary overseas markets |  |

# TRADE PROMOTIONS - ACTIVITY REPORT

| TACTIC | KEY OUTPUTS | ACTIVITY COMPLETED | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | CAN | USA | JAP | CHN | KOR | GER | FRA | UK | AUS |
| **Travel Trade Support** | • To respond to all travel trade inquiries (number of inquiries will be included in each quarterly report)<br>• To make sales calls to our key trade accounts | | | | | | | | | |
| **Trade Shows** | • To Attend Rendezvous Canada (RVC)<br>• To Attend ITB<br>• To Attend Focus Japan-Canada<br>• To Attend Showcase Canada-Asia<br>• To Attend Canadian Inbound Tourism Asia-Pacific (CITAP)<br>• To meet with 150 Travel Trade Companies and part of our B to B sales program<br>• To promote all NWT Export ready products<br>• To generate 25 sales leads for NWTT and our local tourism operators<br>• To Generate 5 qualified leads for the NWTT Trade FAM program | | | | | | | | | |
| **Travel Trade FAM Program** | • To host 1 Trade FAM from each of our primary and secondary overseas markets<br>• To ensure that export ready operators from all regions and sectors are featured in our Trade FAM program | | | | | | | | | |
| **Cooperative Advertising** | • To enter into 10 cooperative marketing agreements with tour wholesales from our primary overseas markets (total for all markets combined)<br>• To enter into 5 cooperative marketing agreements with tour wholesales from our secondary overseas markets (total for all markets combined)<br>• To report all key outcomes our of travel trade coop advertising program | | | | | | | | | |

# TRADE PROMOTIONS - METRICS REPORT

| TACTIC | KEY OUTPUTS | ACTIVITY COMPLETED | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | CAN | USA | JAP | CHN | KOR | GER | FRA | UK | AUS |
| **Travel Trade Exposure** | • To increase the number of Travel Trade operators carrying NWT product by 5% | | | | | | | | | |
| | • To increase the number of NWT packages being sold by the travel trade by 5% | | | | | | | | | |
| | • To set a baseline for the number of packages featured on our NWT Tourism foreign-language websites that are being sold by the travel trade | | | | | | | | | |
| **Package Sold Though the Travel Trade** | • To increase the number of packages sold by the travel trade from our primary overseas markets | | | | | | | | | |
| | • To set a baseline for the number of packages sold by the travel trade from our secondary overseas markets | | | | | | | | | |

## MEETING AND INCENTIVE PROMOTIONS - ACTIVITY REPORT

| TACTIC | KEY OUTPUTS | ACTIVITY COMPLETED | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | CAN | USA | JAP | CHN | KOR | GER | FRA | UK | AUS |
| **MCIT Support** | • To respond to all MCIT inquiries ( number of inquiries will be included in each quarterly report) | | | | | | | | | |
| | • Provide initial responses to all RFPs for meeting planners/associations looking to host their conferences in the NWT. (number of RFPs submitted will be included in each quarterly report) | | | | | | | | | |
| | • To maintain all information listed on the NWT Conference Bureau website | | | | | | | | | |
| **MCIT Shows** | • To attend 4 MCIT marketplaces | | | | | | | | | |
| | • To meet with 30 qualified meeting planners and incentive travel buyers | | | | | | | | | |
| | • To generate 15 sales leads for conferences ranging in size from 50 to 300 delegates | | | | | | | | | |
| | • To generate 5 sales leads for incentive travel looking to book packages with our export ready tourism operators | | | | | | | | | |
| | • To identify 3 meeting planners for a FAM trip to the NWT | | | | | | | | | |
| | • To identify 2 incentive travel buyers for a FAM trip to the NWT | | | | | | | | | |
| **MCIT FAM Program** | • To host 3 conference planners from Canada and the USA | | | | | | | | | |
| | • To host 2 incentive buyers from Canada and/or the USA | | | | | | | | | |

## MEETING AND INCENTIVE PROMOTIONS - METRICS REPORT

| TACTIC | KEY OUTPUTS | ACTIVITY COMPLETED | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | CAN | USA | JAP | CHN | KOR | GER | FRA | UK | AUS |
| **MCIT Revenue** | • To generate $1.5 Million in conference revenue (increase of 7% from current year) | | | | | | | | | |
| | • To generate $50,000 in Incentive Travel revenue | | | | | | | | | |

APPENDIX B

# TARGET MARKET PROFILES

The following are brief outlines of the NWT's primary, secondary and long-term markets. These outlines include minimal research data used to select these markets. All research was obtained from studies and reports prepared by Destination Canada as well as Wikipedia.

For more detailed information on our marketing plans visit:
http://en.corporate.canadatravel.ca/market/partners-en-market-canada

## MARKET SEGMENTATION

The target market profiles have been divided into four sections, each ranked by the ROI of marketing in the specific markets. These geographical markets have been decided based on a number of different factors including product match, demographic match, travel trends, local economies, cost and accessibility. While there are many more markets worldwide, NWTT has to identify its strongest match to best invest marketing campaigns that will attain long term and sustainable results. These matches have been chosen to have the longest lasting effects of marketing promotions and activities to increase visitation to the territory in both short term and long term capacities.

## EMERGING TRENDS

While there are many emerging global trends, the most significant at the moment include Millennial travel (younger demographics travelling), and family travel. Both of these trends allow for larger reach on social media and web based advertising platforms at either low or no cost.

## MARKETING OPPORTUNITIES

As not all of NWTT's target markets are largely English speaking, operators and industry partners are encouraged to participate and provide support for media and trade activities throughout the year. These are the best marketing opportunities available and are typically in conjunction with Destination Canada (The Canadian Tourism Commission) and other provincial and territorial marketing initiatives.

## BRAND RECOGNITION

Canada is still a strong international brand, and the North has a large draw to international visitors. The majority of travellers come to Canada for multiple destination trips and working with airlines and operators to continue creating accessible and reliable programs delivered at a low cost should be a priority of industry members and partners. This will be a key factor in continuing tourism growth into the Northwest Territories.

# CANADA

## FAST FACTS
- Population: 35.15 million
- GDP: 1.82 trillion USD
- 10th largest global economy

## DEMOGRAPHIC MATCH
- Average Age: 35-54
- Education: College/University
- Gender: Male

## TRAVEL PLANNING & TRENDS

| TREND | FINDINGS |
|---|---|
| Northern Canada – Likely to Visit | 3% |
| Destination Ranking (International) | #2 |
| Average Flight Cost (YZF Return) | $750 |
| Key Barrier | Too expensive |
| Source of Information on Canada | Web research |
| Use of Travel Agencies | 10% |

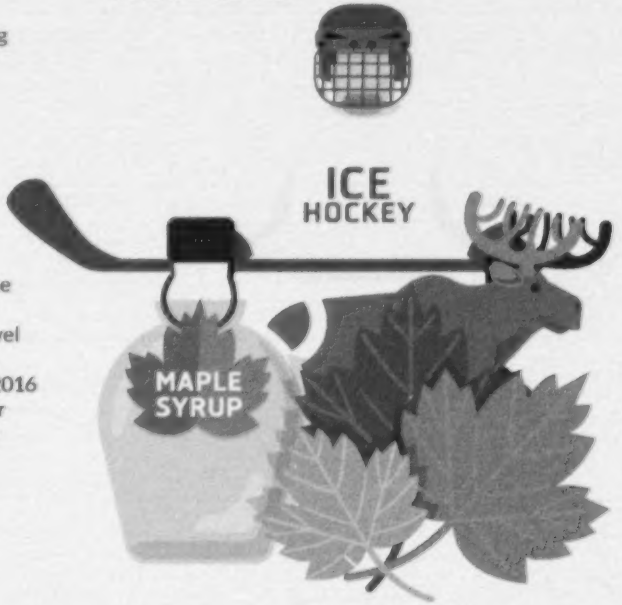
## PRODUCT MATCH
- Nature and cultural attractions
- Beautiful scenery
- Nature with proximity to urban life

## VISITATION TO CANADA
OVERNIGHT ARRIVALS
- 2014 - 113 million
- 2015 - 114 million

VISITOR SPENDING
- 2014 - $70 billion
- 2015 - $73 billion

## KEY MARKETING OPPORTUNITIES
- JOURNALISTS
  - Journalistic pieces play a key role in attracting Canadian travellers
  - Radio spots
  - Writers/bloggers
    - Remy Sclaza
    - Tim Johnson
    - Lukas Aykroyd
- TRADE SHOWS
  - Rendez-Vous Canada | May 2016
  - Première annual tourism industry marketplace hosted by the CTC
  - Buy-In Cost - $10,000 (triple booth), plus travel
  - GoMedia Canada Marketplace | September 2016
  - Hosted by the CTC, premiere marketplace for operators to exchange stories and ideas with international media
  - Buy-In cost - $3,500 plus travel
- FAM TOURS (MEDIA AND TRADE)
  - Process of selection based on sales, interest and market coverage of NWT
- TRAVEL TRADE KEY ACCOUNTS
  - CAA
  - The Great Canadian Adventure Company
  - The Great Canadian Travel Company
  - Top of the World Travel

## EMERGING TRENDS
- Millennial travellers



# UNITED STATES

## FAST FACTS
- Population: 318.6 million
- GDP: 16.79 trillion USD
- #1 largest global economy

## DEMOGRAPHIC MATCH
- Average Age: 34-54
- Education: College/University
- Gender: Female

## TRAVEL PLANNING & TRENDS

| TREND | FINDINGS |
|---|---|
| Northern Canada – Likely to Visit | 19% |
| Destination Ranking (International) | #3 |
| Average Flight Cost (YZF Return) | $700 |
| Key Barrier | Price in conjunction with Canadian Dollar |
| Source of Info on Canada | Television and Media |
| Use of Travel Agencies | 25% |

## PRODUCT MATCH
- Nature experiences
- Unique, local experiences
- Iconic experiences (midnight sun, bush planes, ice roads, -40 degree temperatures)

## VISITATION TO CANADA
OVERNIGHT ARRIVALS
- 2014 - 12,113,487
- 2015 - 12,330,000

VISITOR SPENDING
- 2014 - $7,160 million
- 2015 - $7,900 million

## KEY MARKETING OPPORTUNITIES
- TRADE SHOWS
  - National Tour Association Annual Convention
  - Travel marketplace for group tour operators to meet with suppliers.
  - $1,600 buy in cost, plus travel
- FAM TOURS (MEDIA AND TRADE)
  - Process of selection based on sales, interest and market coverage of NWT
- TRAVEL TRADE KEY ACCOUNTS
  - Globus Tours
  - Collette Tours
  - Tauck World of Discovery
  - Trafalgar Tours
  - Abercrombie & Kent
  - Expedia

## EMERGING TRENDS
- Millennial travellers with high disposable income
  - Best market for conveying messaging and leveraging social media coverage

# JAPAN

## FAST FACTS
- Population: 127,650 million
- GDP: 5.96 trillion USD
- 3rd largest global economy

## DEMOGRAPHIC MATCH
- Average Age: Under 55
- Education: College/University
- Gender: Women

## TRAVEL PLANNING & TRENDS

| TREND | FINDINGS |
|---|---|
| Northern Canada – Likely to Visit | 16% |
| Destination Ranking (International) | #5 |
| Average Flight Cost (YZF Return) | $1,400 |
| Key Barrier | Too expensive |
| Source of Info on Canada | Travel Shows on TV |
| Use of Travel Agencies | 80% |

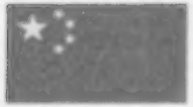
## PRODUCT MATCH
- Aurora Viewing
- Beautiful Scenery
- Culture & Nature Attractions

## VISITATION TO CANADA
OVERNIGHT ARRIVALS
- 2014 - 258,000
- 2015 - 265,000

VISITOR SPENDING
- 2014 - $465 million
- 2015 - $476 million

## KEY MARKETING OPPORTUNITIES
- CTC CAMPAIGNS
  - Hanako & Anne – NHK Television Drama
  - WakuWaku Canada – Television promotion
  - Aurora Kingdom Campaign
- TRADE SHOWS
  - Focus Canada | October, 2016
  - Focus Canada-Japan is a tourism workshop that will bring together Canadian suppliers with over 70 Japanese tourism professionals to promote Canadian destinations, tourism products and experiences. The event will also help Canadian businesses enhance their sales and business relationships with key players in Japanese tourism industry through networking events.
  - Buy-In Cost - $1,500 (two day show), plus travel
- FAM TOURS (MEDIA AND TRADE)
  - Process of selection based on sales, interest and market coverage of NWT
- TRAVEL TRADE KEY ACCOUNTS
  - HIS
  - JTB World Vacations
  - CTI (Club Tourism International)
  - Hankyu (trapics)
  - Kintetsu

## EMERGING TRENDS
- School group travel



# CHINA

## FAST FACTS

- Population: 1.4 billion
- GDP: 9.18 trillion USD
- 2nd largest global economy

## DEMOGRAPHIC MATCH

- Average Age: 18-34
- Education: College/University
- Gender: Male

## TRAVEL PLANNING & TRENDS

| TREND | FINDINGS |
|---|---|
| Northern Canada – Likely to Visit | 8% |
| Destination Ranking (International) | #3 |
| Average Flight Cost (YZF Return) | $1,700 |
| Key Barrier | Too expensive |
| Source of Info on Canada | Travel TV Shows |
| Use of Travel Agencies | 90% |

## PRODUCT MATCH

- Seeing beautiful scenery
- Nature activities with proximity to cities
- Cultural and urban activities

## VISITATION TO CANADA

OVERNIGHT ARRIVALS

- 2014 - 525,000
- 2015 - 531,000

VISITOR SPENDING

- 2014 - $1,056 million
- 2015 - $1,300 million

- By 2020 it is estimate China will have over 100 million international travellers

## KEY MARKETING OPPORTUNITIES

- CTC TV – ONLINE TV SHOW
  - Gets over 1 million viewers
  - Creates buzz and explore over destinations
- TRADE SHOWS
  - Showcase Asia-Canada | September 2016
  - Marketplace showcases Canada with buyers from China and South Korea in business environment with pre-scheduled appointments
  - $3,500 buy in cost, plus travel
- FAM TOURS (MEDIA AND TRADE)
  - Process of selection based on sales, interest and market coverage of NWT
- TRAVEL TRADE KEY ACCOUNTS
  - China CYTS Sightseeing Travel Service
  - Shanghai Jinjiang Tours Co. Ltd
  - Ctrip International Travel Service Co., Ltd
  - GZL International Travel Service Ltd
  - Guangdong Nanhu International Travel Service Co., Ltd
  - DIADEMA

## EMERGING TRENDS

- Significant shift from group travel to FIT travel
- Millennial travellers with high disposable income

# GERMANY

## FAST FACTS

- Population: 80.4 million
- GDP: 3.4 trillion USD
- 4th largest global economy

## DEMOGRAPHIC MATCH

- Average Age: 35-55 and up
- Education: College/University
- Gender: Male & Female

## TRAVEL PLANNING & TRENDS

| TREND | FINDINGS |
|---|---|
| Northern Canada – Likely to Visit | 11% |
| Destination Ranking (International) | #2 |
| Average Flight Cost (YZF Return) | $3,900 |
| Key Barrier | Too expensive |
| Source of Info on Canada | Traditional Media/Online |
| Use of Travel Agencies | 90% (for Canada) |

## PRODUCT MATCH

- Beautiful Scenery
- National Parks & Wildlife
- Aurora Viewing
- Touring
- Cultural & Natural Attractions

## VISITATION TO CANADA

OVERNIGHT ARRIVALS

- 2014 - 341,456
- 2013 - 358,000 (estimate)

VISITOR SPENDING

- 2014 - $480 million (estimate)
- 2013 - $504 million (estimate)

## KEY MARKETING OPPORTUNITIES

- CTC CAMPAIGNS
- CTC Germany Pilot – Social Media / Online Campaign
- Canada Specialist Program

- TRADE SHOWS
  - CMT Stuttgart Consumer Show
  - Timing: Jan. 16-24, 2016, Stuttgart
  - Held in Stuttgart, the CMT Consumer Show is Europe's largest tourism consumer show. For nine days CMT revolves around one thing: Holidays – in all its facets. This means 9 days of non-stop business. Suppliers from all over the world generate their first and also most important sales of the year at CMT.
  - Buy-in cost: CAD 4,400 (9 days) plus travel for a single booth (sharing is possible!)

  - ITB Berlin
  - Timing: March 9-13, 2016, Berlin
  - Under the CTC's leadership, some 40 Canadian sellers attend ITB Berlin, the world's largest tourism trade show. The show provides an excellent opportunity to promote diverse Canadian experiences and destinations to international trade.
  - Buy-in cost: CAD 6,500 plus travel cost

- FAM TOURS (MEDIA AND TRADE)
  - Process of selection based on sales, interest and market coverage of NWT

- TRAVEL TRADE KEY ACCOUNTS
  - Canusa Touristik GmbH & Co KG
  - SK Touristik
  - TourConsult

## EMERGING TRENDS

- Green travel
- Active holidays (outdoor activities)

# SOUTH KOREA

## FAST FACTS

- Population: 50.2 million
- GDP: 1.22 trillion USD
- 10th largest global economy

## DEMOGRAPHIC MATCH

- Average Age: 69-98
- Education: College/University
- Gender: Male

## TRAVEL PLANNING & TRENDS

| TREND | FINDINGS |
|---|---|
| Northern Canada - Likely to Visit | 25% |
| Destination Ranking (International) | 6th |
| Average Flight Cost (YOR Return) | $1,600 |
| Key Barrier | Too expensive |
| Source of Info on Canada | TV Shows/Documentaries |
| Use of Travel Agencies | 60% |

- Seat capacity direct to Canada (to/from) is 6th in 2018, total arrivals rose over 50% proving better access and improved routing and costs

## PRODUCT MATCH

- Beautiful scenery
- Opportunities to see and interact with nature
- Visiting friends and relatives

## VISITATION TO CANADA

OVERNIGHT ARRIVALS

- 2018 - 
- 2017 - 

VISITOR SPENDING

- 2018 - $
- 2017 - $

## KEY MARKETING OPPORTUNITIES

- SIMILAR TO CHINESE MARKET
  - Evolving experiences, and receptive to the CTC's marketing efforts. Partnerships with the CTC and buy-in opportunities continue to be one of the best ways to achieve media attention
- TRADE SHOWS
  - Hana Tour International Travel Fair | June 2018
  - Trade & consumer event organized by Hana Tour (largest tour company in South Korea)
  - Buy-in approximately $2,000 plus travel
- FAM TOURS (MEDIA AND TRADE)
  - Process of selection based on sales, interest and market coverage of NMT
- TRAVEL TRADE KEY ACCOUNTS
  - Hanatour
  - Interpark Travel
  - Seagro Travel
  - Verb/Good Tour

## EMERGING TRENDS

- Family vacation travel

# AUSTRALIA

## FAST FACTS
- Population: 23.6 million
- GDP: 1.51 trillion USD
- 12th largest global economy

## DEMOGRAPHIC MATCH
- Average Age: 18-54
- Education: College/University
- Gender: Male/Female (equal split)

## TRAVEL PLANNING & TRENDS

| TREND | FINDINGS |
|---|---|
| Northern Canada - Likely to Visit | 35% |
| Destination Ranking (International) | #2 |
| Average Flight Cost (YZF Return) | $3,200 |
| Key Barrier | Too expensive |
| Source of Info on Canada | Journalistic Pieces |
| Use of Travel Agencies | 80% |

## PRODUCT MATCH
- Outdoor activity and wildlife viewing
- Beautiful scenery
- White Christmas and northern lights

## VISITATION TO CANADA
OVERNIGHT ARRIVALS
- 2014 - 284,000
- 2015 - 301,040

VISITOR SPENDING
- 2014 - $699 million
- 2015 - $735 million

## KEY MARKETING OPPORTUNITIES
- JOURNALISTIC COVERAGE AND WORD OF MOUTH
  - Huge low-cost marketing opportunities in this market. Operators are encouraged to work with Media FAMs when presented.
- KEY MEDIA INFLUENCERS
  - Justin Walker
  - Angela Saurine
  - Fiona Harper
- TRADE SHOWS
  - Canada Connbree | February 2016
  - 9 day Australia road show that targets travel agents and media
  - Buy in approximately $8,500 plus travel
- FAM TOURS (MEDIA AND TRADE)
  - Process of selection based on sales, interest and market coverage of NWT
- TRAVEL TRADE KEY ACCOUNTS
  - Destination Canada
  - Adventure World

## EMERGING TRENDS
- Family vacation travel

# SWITZERLAND

## FAST FACTS
- Population: 8.01 million
- GDP: 632 million USD
- 19th largest global economy

## DEMOGRAPHIC MATCH
- Average Age: 35-55 and up
- Education: College/University
- Gender: Male & Female / Families

## TRAVEL PLANNING & TRENDS

| TREND | FINDINGS |
|---|---|
| Northern Canada - Likely to Visit | - |
| Destination Ranking (International) | #4 |
| Average Flight Cost (YZF Return) | $1,900 |
| Key Barrier | Too expensive/Unknown |
| Source of Info on Canada | Traditional Media/Online |
| Use of Travel Agencies | 85% |

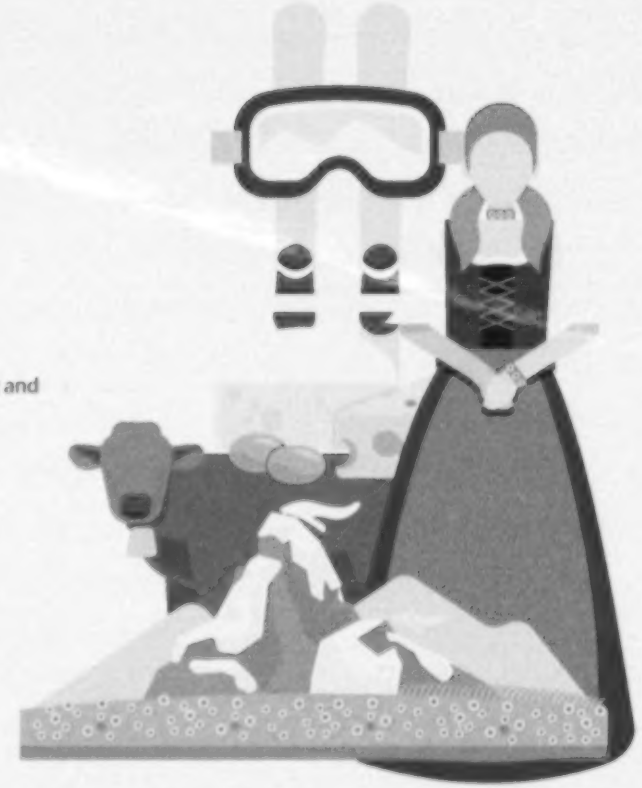
## PRODUCT MATCH
- Beautiful Scenery
- National Parks & Wildlife
- Road touring

## VISITATION TO CANADA
OVERNIGHT ARRIVALS
- 2014 - 103,121
- 2015 - 104,000 (estimate)

VISITOR SPENDING
- 2014 - $ Unknown
- 2015 - $ Unknown

## KEY MARKETING OPPORTUNITIES
- CTC CAMPAIGNS
  - Not a CTC Target market
- TRADE SHOWS
  - n/a
- FAM TOURS (MEDIA AND TRADE)
  - Process of selection based on sales, interest and market coverage of NWT
- TRAVEL TRADE KEY ACCOUNTS
  - Para Tours
  - Skytours
  - Hotelplan
  - Travelhouse

## EMERGING TRENDS
- Outdoor / Active holidays



# FRANCE

## FAST FACTS
- Population: 66.3 million
- GDP: 2.73 trillion USD
- 5th largest global economy

## DEMOGRAPHIC MATCH
- Average Age: All ages (families)
- Education: College/University
- Gender: Male/Female (equal split)

## TRAVEL PLANNING & TRENDS

| TREND | FINDINGS |
|---|---|
| Northern Canada - Likely to Visit | 30% |
| Destination Ranking (International) | #2 |
| Average Flight Cost (YZF Return) | $1,500 |
| Key Barrier | Too expensive |
| Source of Info on Canada | TV/Media/Word of Mouth |
| Use of Travel Agencies | 50% |

## PRODUCT MATCH
- Beautiful Scenery
- Unique, local experiences
- National Parks & Wildlife

## VISITATION TO CANADA
OVERNIGHT ARRIVALS
- 2014 - 473,000
- 2015 - 500,000

VISITOR SPENDING
- 2014 - $783 million
- 2015 - $801 million

## KEY MARKETING OPPORTUNITIES
- TRADE SHOWS
  - IFTM - Top Resa
  - France's B2B international tourism exhibition for networking and business
  - $4,500 buy in cost, plus travel
- FAM TOURS (MEDIA AND TRADE)
  - Process of selection based on sales, interest and market coverage of NWT
- TRAVEL TRADE KEY ACCOUNTS
  - Grand Nord Grand Large
  - Backroads
  - Maison des Ameriques
  - Voyamar
  - Compitor du Canada
  - Voyageurs du Monde

## EMERGING TRENDS
- Bilingual tour groups
- Milennial travellers

# UNITED KINGDOM

## FAST FACTS
- Population: 64 million
- GDP: 2,54 trillion USD
- 6th largest global economy

## DEMOGRAPHIC MATCH
- Average Age: 35-54
- Education: College/University
- Gender: Female

## TRAVEL PLANNING & TRENDS

| TREND | FINDINGS |
|---|---|
| Northern Canada – Likely to Visit | 20% |
| Destination Ranking (International) | #4 |
| Average Flight Cost (YZF Return) | $1,800 |
| Key Barrier | Too expensive |
| Source of Info on Canada | Journalistic Pieces |
| Use of Travel Agencies | 50% |

## PRODUCT MATCH
- Beautiful scenery
- National Parks & wildlife
- Visiting friends & family

## VISITATION TO CANADA
OVERNIGHT ARRIVALS
- 2014 - 635,000
- 2015 - 670,000

VISITOR SPENDING
- 2014 - $1125 million
- 2015 - $1167 million

## KEY MARKETING OPPORTUNITIES
- JOURNALISTIC COVERAGE AND WORD OF MOUTH
  - Huge low-cost marketing opportunities in this market. Operators are encouraged to work with Media FAMs when presented.
- KEY MEDIA INFLUENCERS
  - Mark Carwardine
  - Simon Calder
  - Norman Miller
- TRADE SHOWS
  - World Travel Market | November 2016
  - Global B2B travel-trade show staged in London
  - Buy-in Cost $7,075 plus travel
- FAM TOURS (MEDIA AND TRADE)
  - Process of selection based on sales, interest and market coverage of NWT
- TRAVEL TRADE KEY ACCOUNTS
  - Discover the World
  - Trailfinders
  - Audley Travel
  - Cox & Kings
  - Frontier Travel

## EMERGING TRENDS
- Millennials

# MEXICO

## FAST FACTS
- Population: 118.4 million
- GDP: 1.26 trillion USD
- 14th largest global economy

## DEMOGRAPHIC MATCH
- Average Age: 18-34
- Education: College/University
- Gender: Male

## TRAVEL PLANNING & TRENDS

| TREND | FINDINGS |
|---|---|
| Northern Canada - Likely to Visit | 38% |
| Destination Ranking (International) | #2 |
| Average Flight Cost (YZF Return) | $950 |
| Key Barrier | Too expensive |
| Source of Info on Canada | TV & Journalistic Pieces |
| Use of Travel Agencies | 40% |

## PRODUCT MATCH
- Beautiful Scenery
- Regional Cuisine
- Experiencing historical and cultural attractions

## VISITATION TO CANADA
OVERNIGHT ARRIVALS
- 2014 - 170,000
- 2015 - 187,000

VISITOR SPENDING
- 2014 - $295 million
- 2015 - $321 million

## KEY MARKETING OPPORTUNITIES
- TRADE SHOWS
  - Conozco Canada, October 2016
  - B2B event to connection Canadian Sellers with Mexican Buyers
  - $1,900 buy in cost, plus travel
- FAM TOURS (MEDIA AND TRADE)
  - Process of selection based on sales, interest and market coverage of NWT
- TRAVEL TRADE KEY ACCOUNTS
  - American Experess
  - Diventure
  - Viajes Palacio

## EMERGING TRENDS
- Family Travel

# BRAZIL

## FAST FACTS
- Population: 202 million
- GDP: 2.53 trillion USD
- 7th largest global economy

## DEMOGRAPHIC MATCH
- Average Age: 18-34
- Education: College/University
- Gender: Male

## TRAVEL PLANNING & TRENDS

| TREND | FINDINGS |
|---|---|
| Northern Canada - Likely to Visit | 26% |
| Destination Ranking (International) | #6 |
| Average Flight Cost (YZF Return) | $1,600 |
| Key Barrier | Too expensive/Weather |
| Source of Info on Canada | TV & Journalistic Pieces |
| Use of Travel Agencies | 82% |

## PRODUCT MATCH
- Visiting historical sites
- Experiencing interesting culture
- Visiting Friends and Relatives

## VISITATION TO CANADA
OVERNIGHT ARRIVALS
- 2014 - 90,000
- 2015 - 97,000

VISITOR SPENDING
- 2014 - $225 million
- 2015 - $236 million

## KEY MARKETING OPPORTUNITIES
- TRADE SHOWS
  - World Travel Market Latin America | April 2016
  - Leading global event in Sao Paulo for Latin American travel industry.
  - $3,500 buy in cost, plus travel
- FAM TOURS (MEDIA AND TRADE)
  - Process of selection based on sales, interest and market coverage of NWT
- TRAVEL TRADE KEY ACCOUNTS
  - Incentours

## EMERGING TRENDS
- Family Travel

# INDIA

## FAST FACTS
- Population: 1.2 billion
- GDP: 1.87 trillion USD
- 10th largest global economy

## DEMOGRAPHIC MATCH
- Average Age: 18-34
- Education: College/University
- Gender: Male

## TRAVEL PLANNING & TRENDS

| TREND | FINDINGS |
|---|---|
| Northern Canada – Likely to Visit | 17% |
| Destination Ranking (International) | #9 |
| Average Flight Cost (YZF Return) | $2,000 |
| Key Barrier | Too expensive/Weather |
| Source of Info on Canada | TV & Journalistic Pieces |
| Use of Travel Agencies | 92% |

## PRODUCT MATCH
- Beautiful scenery
- Urban activities
- Visiting friends and relatives

## VISITATION TO CANADA
OVERNIGHT ARRIVALS
- 2008 - 180,000
- 2013 - 200,000

VISITOR SPENDING
- 2008 - $267 million
- 2013 - $290 million

## KEY MARKETING OPPORTUNITIES
- TRADE SHOWS
  - Focus Canada India Marketplace
  - Prescheduled B2B meetings for networking and relationship building with industry partners and travel agents throughout India
  - $3,500 buy in cost, plus travel
- FAM TOURS (MEDIA AND TRADE)
  - Process of selection based on sales, interest and market coverage of WEST
- TRAVEL TRADE KEY ACCOUNTS
  - Thomas Cook Travel

## EMERGING TRENDS
- Family Travel

# NETHERLANDS

## FAST FACTS
- Population: 16.8 million
- GDP: 800 million USD
- 18th largest global economy

## DEMOGRAPHIC MATCH
- Average Age: 35-55 and up
- Education: College/University
- Gender: Male & Female / Families

## TRAVEL PLANNING & TRENDS

| TREND | FINDINGS |
|---|---|
| Northern Canada - Likely to Visit | - |
| Destination Ranking (International) | 84 |
| Average Flight Cost (YZF Return) | $1,900 |
| Key Barrier | Too expensive/Unknown |
| Source of Info on Canada | Traditional Media/Online |
| Use of Travel Agencies | 85% |

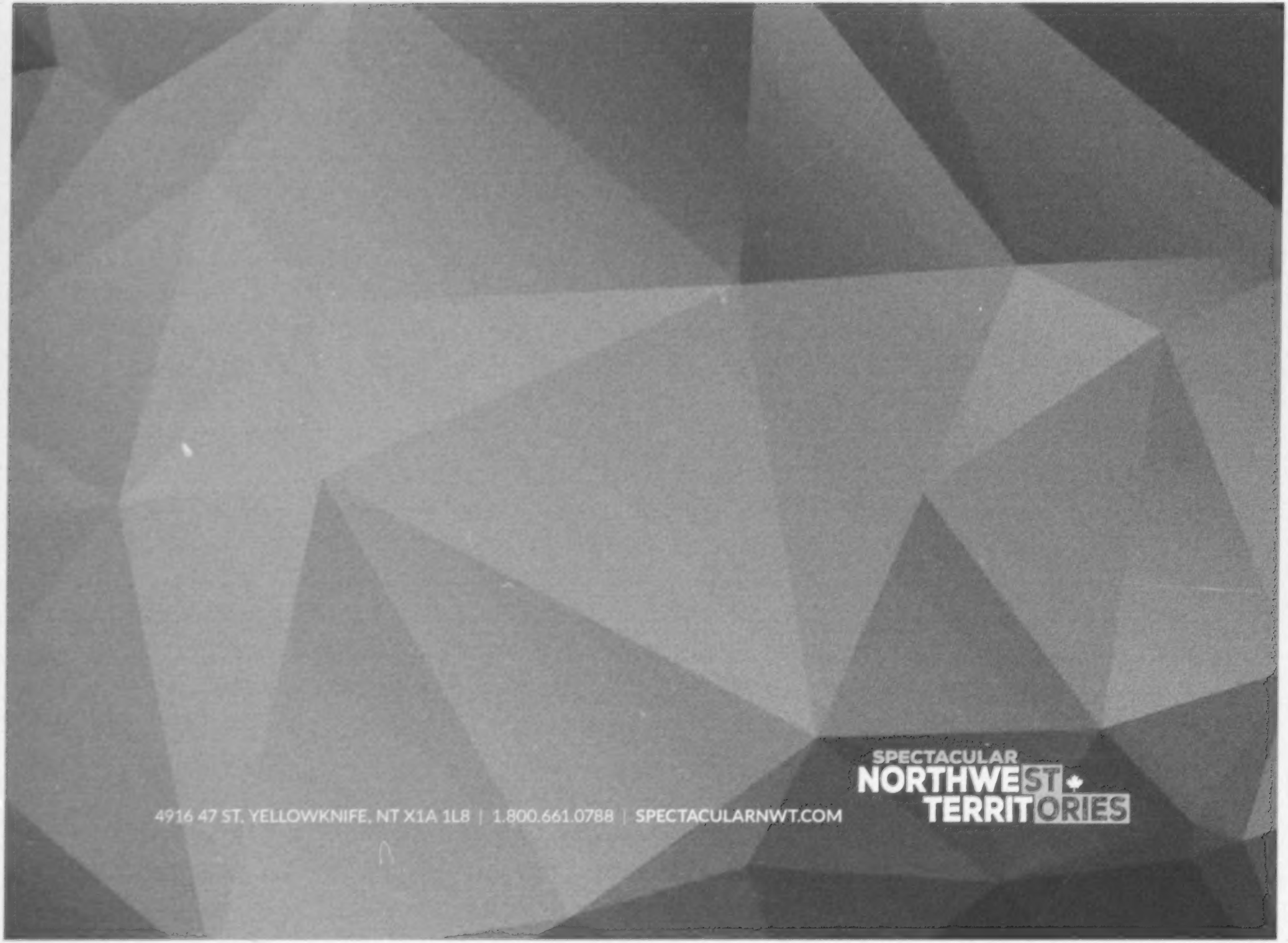
## PRODUCT MATCH
- Beautiful Scenery
- National Parks & Wildlife
- Road touring

## VISITATION TO CANADA
OVERNIGHT ARRIVALS
- 2014 - 103,121
- 2015 - 104,000 (estimate)

VISITOR SPENDING
- 2014 - $ Unknown
- 2015 - $ Unknown

## KEY MARKETING OPPORTUNITIES
- CTC CAMPAIGNS
  - Not a CTC Target market
- TRADE SHOWS
  - n/a
- FAM TOURS (MEDIA AND TRADE)
  - Process of selection based on sales, interest and market coverage of NWT
- TRAVEL TRADE KEY ACCOUNTS
  - Go Canada
  - Travelhome
  - Travel Trend
  - WRC Reizen Groep

## EMERGING TRENDS
- Active holidays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